

# Splash V7

User Documentation

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## Defining Student Details

Personal information about each student is maintained in this module. It contains a history of all bookings and documents a student's progress towards class goals. This module can be used to generate birthday lists and correspondence. Custom fields in this module enable you to store additional information outside the system defaults.

### The Student Record

Each student record contains generic information about the student and their family. On the right of the screen you will see five tab cards; Bookings, Achievements, Waiting List, Correspondence, and Custom Fields.

The screenshot shows the 'Splash Students' application window. The top menu bar includes File, Edit, View, Insert, Format, Students, Scripts, Print, and Tools. The title bar says 'Today's Date: 11/1/2018'. The main interface is divided into several sections:

- Filter By Student Name:** A search bar with 't' entered and a list of students with their ages (e.g., Bobby Thomson 5\_10m, Brenda Thomas 2\_7m).
- Student ID:** 13
- Student Details:** Name (Jacob Smith), Preferred (Jake), Date of Birth (22/7/2012), Age (5\_5m), Gender (Male), Medical (Medical Conditions), and a photo of a child.
- Comments:** A text area for comments.
- Right Panel:** Tabs for 'Contact People', '3 Other Family Members', and 'Additional Information'. The 'Contact People' tab shows a list of family members: Lucas Smith (5\_7m, Penguin), Sam Smith (6\_3m), and Nicholas Smith (6\_3m, Turtles).
- Bottom Panel:** Tabs for 'Bookings', 'Catchups', 'Waiting List', 'Achievements', 'Correspondence', and 'Comments/Custom'. The 'Bookings' tab shows a table of bookings with columns for Date, Time, Name, and Block/Year.

| Date     | Time        | Name               | Block/Year       |
|----------|-------------|--------------------|------------------|
| 11/01/18 | Thu 3:30 PM | Jacob (Jake) Smith | Penguin Jan 2018 |
| 10/01/18 | Wed 4:00 PM | Jacob (Jake) Smith | Penguin Jan 2018 |
| 6/12/17  | Wed 4:00 PM | Jacob (Jake) Smith | Penguin Dec 2017 |
| 4/12/17  | Mon 3:30 PM | Jacob (Jake) Smith | Penguin Dec 2017 |
| 6/11/17  | Mon 3:30 PM | Jacob (Jake) Smith | Penguin Nov 2017 |
| 6/11/17  | Mon 4:00 PM | Jacob (Jake) Smith | Penguin Nov 2017 |
| 2/10/17  | Mon 3:30 PM | Jacob (Jake) Smith | Penguin Oct 2017 |
| 4/09/17  | Mon 3:30 PM | Jacob (Jake) Smith | Penguin Sep 2017 |

Reason for Lessons: First Swim 5/5/17, Age First Swim 4.9. Exit Reason: Exit Date, Last Swim 31/1/18, Age Last Swim 5.5.

**NB:** Display family information or access the family file by clicking the Primary Contact tab card.

The screenshot shows the 'Contact People' tab in the 'Additional Information' section. It displays the 'Primary Contact' information for Martha Taylor, including her name, relationship (Mother), email (computerize@xtra.co.nz), default telephone (0272222082), and mobile (0272222082). There is an SMS icon next to the mobile number. Below this, there is a section for 'Other Contact' with fields for Name and Mobile.

**NB:** Send a SMS directly to the selected family by clicking the SMS icon to the left of the Mobile telephone number. The SMS button will only be displayed if the client has a mobile number recorded.

**Student Bookings** – The Bookings tab card within the student file displays a list of all bookings made for the selected student. Each booking line displays the payment status, day, time, class name, and block. Exited bookings are also displayed in the list, however they are colour coded for easy identification. Navigate quickly to a selected booking by clicking the magnifier to the left of the required booking.

The screenshot shows the 'Students' window in the Splash software. The 'Bookings' tab is selected, displaying a list of 11 total enrolments for Student ID 13, Jacob (Jake) Smith. The list includes columns for date, day, time, class name, and block. A blue arrow points to the booking for 6/12/17 at 4:00 PM. The interface also shows contact people and family members on the right.

| Enrolment | Date | Day     | Time               | Class Name | Block    |
|-----------|------|---------|--------------------|------------|----------|
| 11/01/18  | Thu  | 3:30 PM | Jacob (Jake) Smith | Penguin    | Jan 2018 |
| 10/01/18  | Wed  | 4:00 PM | Jacob (Jake) Smith | Penguin    | Jan 2018 |
| 6/12/17   | Wed  | 4:00 PM | Jacob (Jake) Smith | Penguin    | Dec 2017 |
| 4/12/17   | Mon  | 3:30 PM | Jacob (Jake) Smith | Penguin    | Dec 2017 |
| 6/11/17   | Mon  | 3:30 PM | Jacob (Jake) Smith | Penguin    | Nov 2017 |
| 6/11/17   | Mon  | 4:00 PM | Jacob (Jake) Smith | Penguin    | Nov 2017 |
| 2/10/17   | Mon  | 3:30 PM | Jacob (Jake) Smith | Penguin    | Oct 2017 |
| 4/09/17   | Mon  | 3:30 PM | Jacob (Jake) Smith | Penguin    | Sep 2017 |

**Catchup and Makeup Lessons** – Displayed in the second tab card; this card displays past, current, and future makeup lessons. Each lesson is colour coded for easy identification of status.

The screenshot shows the 'Students' window in the Splash software. The 'Catchups' tab is selected, displaying a list of 2 total enrolments for Student ID 13, Jacob (Jake) Smith. The list includes columns for date, day, time, class name, and block. The interface also shows contact people and family members on the right.

| Enrolment | Date | Day      | Time               | Class Name | Block    |
|-----------|------|----------|--------------------|------------|----------|
| 19/01/18  | Fri  | 10:30 AM | Jacob (Jake) Smith | Penguin    | Jan 2018 |
| 12/01/18  | Fri  | 8:30 AM  | Jacob (Jake) Smith | Penguin    | Jan 2018 |

**Waiting List** – Displayed in the third tab card; Waiting List displays a list of all sessions the student is currently waitlisted on. Remove the student from a waiting list by clicking the red cross on the right of the row you wish to remove

The screenshot shows the 'Waiting List' tab for Student ID 13. The left sidebar lists students, with 'Jacob (Jake) Smith' selected. The main area displays student details: Name (Jacob Smith), Preferred (Jake), Date of Birth (22/7/2012), Age (5.5m), Gender (Male), Medical (Medical Conditions), and a large Comments field. A photo of the student is shown. On the right, a list of family members is displayed: Lucas Smith (5.7m, Penguin), Sam Smith (6.3m), and Nicholas Smith (6.3m, Turtles). At the bottom, a table shows the student's waiting list entries.

| Weekday                                 | Class   | Block         | Year     |
|---|---------|---------------|----------|
| 11/01/18 Fri 11:00 AM                   | Penguin | To Be Advised | Jan 2018 |
| Can only swim Fridays from January 2018 |         |               |          |

**Achievements** – Displayed in the second tab card; Achievements displays a history of goals associated with all classes the student has been scheduled to attend. Within the achievements list you can monitor the students' progress towards each of the assigned goals.

The screenshot shows the 'Achievements' tab for Student ID 13. The left sidebar lists students, with 'Bobby Thomson' selected. The main area displays student details: Name (Jacob Smith), Preferred (Jake), Date of Birth (22/7/2012), Age (5.5m), Gender (Male), Medical (Medical Conditions), and a large Comments field. A photo of the student is shown. On the right, a list of family members is displayed: Lucas Smith (5.7m, Penguin), Sam Smith (6.3m), and Nicholas Smith (6.3m, Turtles). At the bottom, a table shows the student's achievements.

|         |   |                            |
|---------|---|----------------------------|
| PENGUIN | 1 | Blowing Bubbles Eyes Under |
| PENGUIN | 2 | Freestyle kick with board  |
| PENGUIN | 3 | A torpedo                  |
| PENGUIN | 4 | 4 circle arms              |
| PENGUIN | 5 | Back Kick                  |

**Correspondence** – The fourth tab card on the student file; Correspondence displays a list of all communication with the student or the student’s family in direct relation to the selected student. Correspondence may be email, SMS, letter or a file note. Click the Create Correspondence button to create a new correspondence item.

The screenshot shows the 'Students' window in the Splash application. The 'Correspondence' tab is selected. The student profile for Jacob Smith (ID 13) is displayed, including his name, preferred name (Jake), date of birth (22/7/2012), age (5.5m), and gender (Male). A list of correspondence items is shown below the profile:

| Date     | Type    | From          | To  |
|----------|---------|---------------|---|
| 11/01/18 | Letter  | Jacob Smith   | Happy Birthday                            |
| 11/01/18 | Booking | Barbara Smith | Swim School Multiple Booking Confirmation |

Buttons for 'Bookings', 'Catchups', 'Waiting List', 'Achievements', 'Correspondence', and 'Comments/Custom' are visible at the bottom of the student profile section.

**Student Custom Fields** – The Custom Fields tab card within the student file displays seven additional fields for storing information about the student. Five text fields and two date fields have been created for custom use. Define the labels for your custom fields in the Preferences area of Splash.

The screenshot shows the 'Students' window in the Splash application. The 'Comments/Custom' tab is selected. The student profile for Jacob Smith (ID 13) is displayed. The 'Comments' section is empty. The 'Custom Fields' section contains the following fields:

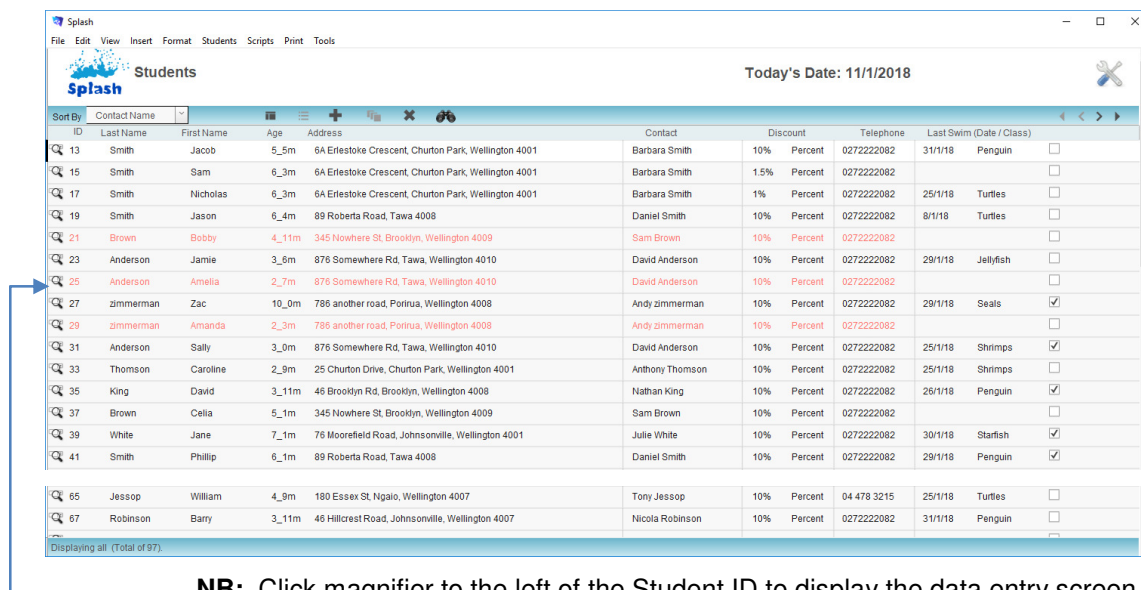
- Mums Occupation
- Dads Occupation
- Custom Text 3
- Custom Text 4
- Custom Text 5
- Custom Date 1
- Custom Date 2

The 'Comments' section is empty, and the 'Custom Fields' section is currently blank.



## Listing Student Records

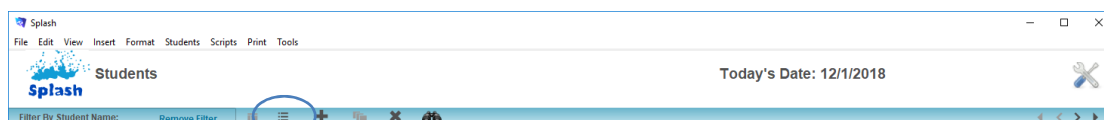
Each record in your database can be displayed in either form view or list view. List view will display all records in the found set – see the bottom left corner of the screen for the size of the current found set.



**NB:** Click magnifier to the left of the Student ID to display the data entry screen.

### Displaying a List of Students (from Student Details)

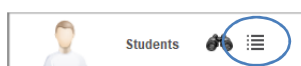
1. Click once on the **List View** button displayed in the blue stripe at the top of your screen.



2. The Student List View screen will be displayed.

### Displaying a List of Student (from outside Student screen)

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Student List** icon



3. The Student List View screen will be displayed

## Adding a New Student to an Existing Family

A new student record must be created whenever a new student joins the swim school. A student cannot be booked in to a session unless they have been registered in Splash. New students may be added through the Students module or via the Family file.

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Student** icon



3. The Student data entry screen will be displayed
4. Click once on the **Add Student** button displayed in the blue stripe at the top of your screen.



6. Enter the Students' First Name and Surname along with any other personal details you may have.
7. Click the Family icon to select the family the student should be linked to.
8. The **Select a Family** dialog will be displayed on your screen. The student surname will automatically be copied to the filter field and all existing families with a matching surname will be displayed.

9. If the family you require is listed, simply click the line displaying the required family name.

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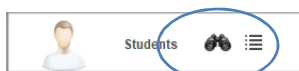
10. After selecting a family you will be returned to the Add New Student dialog, complete the remaining student details and click **Done**.

11. The information will be saved and you will be returned to the Student detail screen.

The screenshot shows the 'Students' application window. On the left, there is a list of students with columns for 'Display', 'First Name', and 'Age'. The main area displays the details for a student with ID 39304, including Name (Benjamin Taylor), Preferred (Ben), Date of Birth (5/9/2014), Age (3.5m), Gender (Male), and Medical Conditions. There is also a section for 'Primary Contact' with details for Martha Taylor. At the bottom, there are tabs for 'Bookings', 'Makeup', 'Waiting List', 'Achievements', 'Correspondence', and 'Comments/Custom'. The 'Bookings' tab is active, showing a table with columns for 'Total Enrolments', 'Block/Year', 'Reason for Lessons', 'Water Safety', 'Exit Reason', 'Exit Date', 'Last Swim', and 'Age Last Swim'.

## Finding a Student

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Student Find** icon



3. The **Search for a Student** dialog box will be displayed on your screen.

The screenshot shows the 'Search for a Student' dialog box. It has a search bar at the top with a 'Find Now' button. Below the search bar, there are several input fields for searching by Student ID, Student Name, Address, Family Email, Family Contact Name, Family Telephone, Mobile Telephone, Family Alert, Medical Condition, Automatically Rollover Booking, Discount Rate, Discount Type, Credits Owing, Payment Authority Held, and Comments. There are also dropdown menus for Status, Gender, Allow Photo, Student Birthday (Date of Birth, Age, Month, Day of Month), and Exit Reason. At the bottom, there are buttons for 'Cancel', 'New Request', 'Omit Records', 'Constrain Set', 'Extend Set', and 'Find Now'.

4. Enter the criteria for your find by typing your request in the corresponding field/s.

5. Click the **Find Now** button.
6. If one record is located the record will be displayed on the Student entry screen. If multiple records are located the found set will be displayed in the list view.

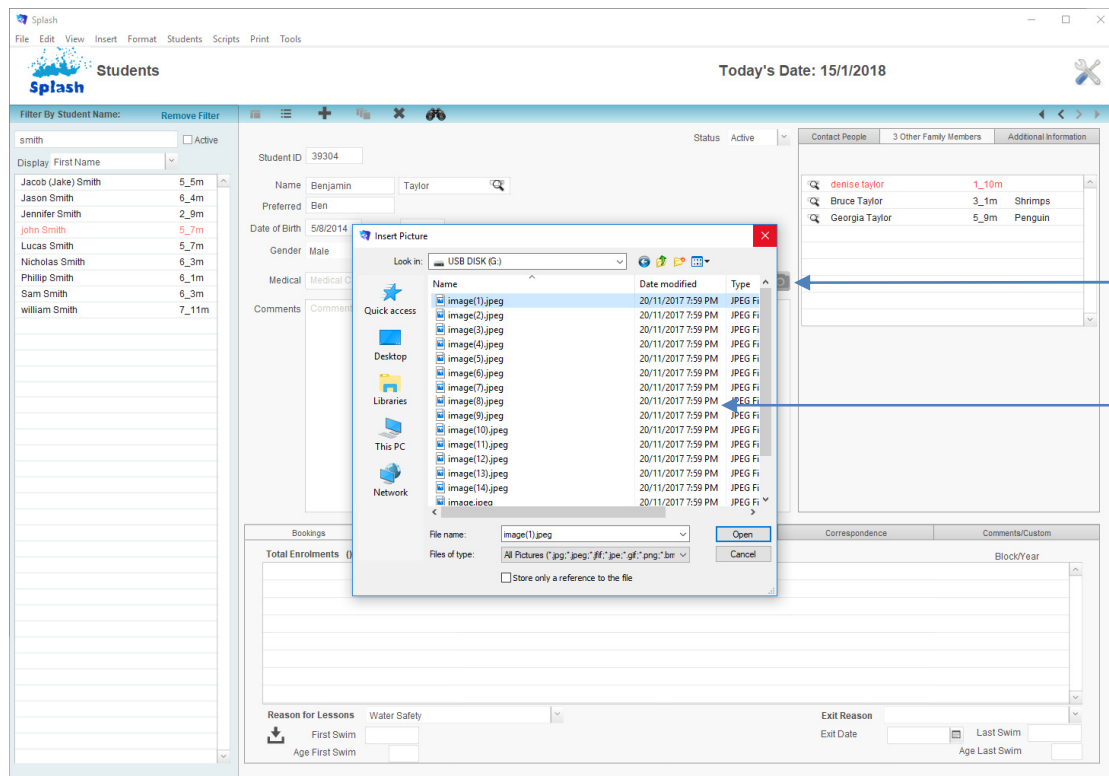
**NB:** See *Advanced Find Techniques* within this guide for assistance with Constraining or Extending the found set.

## Updating Student Details

1. Use the **Finding a Student** function to locate the student record you wish to update.
2. When the correct student screen is displayed simply overtype any of the information to update the information that has been stored.

## Inserting a Photograph

1. Use the **Finding a Student** function to locate the student record you wish to update.
2. When the correct student screen is displayed click once in the Camera icon.



3. Click once inside the large photo field.
4. Select **Picture** from the **Insert** menu.
5. Locate and select the student photograph.
6. Click **Insert** to place the photograph on the student file.

The screenshot shows the 'Splash Students' application window. On the left is a sidebar with a 'Filter By Student Name' search bar and a list of students. The main area displays the details for 'TAYLOR, Benjamin (Ben) 15/01/2018'. The details include fields for Name, Preferred Name, Date of Birth, Age, Gender, Medical Conditions, and a Photo field. The Photo field is highlighted with a red box. Below the details are tabs for Bookings, Makeup, Waiting List, Achievements, Correspondence, and Comments/Custom. The Photo field is located at the top right of the main form, next to the 'Allow Photo' checkbox.

### Removing a Student Photograph

1. Use the **Finding a Student** function to locate the student record you wish to update.
2. When the correct student screen is displayed click once in the Photo field.
3. Click once inside the large photo field.
4. Press the **Delete** key on your keyboard.

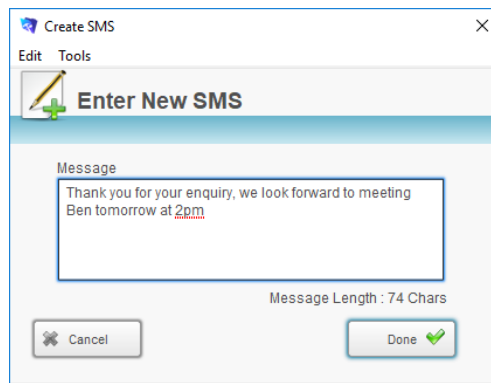
### Sending a SMS Message

SMS messages can be sent to individual recipients or all recipients in the found set. These instructions outline the process for sending an SMS message to the current students' family. SMS messages can only be sent if you have configured your system defaults to send SMS messages and you have created an account with SMSGlobal.

1. Use the **Finding a Student** function to locate the student record you wish to update.
2. When the correct student record is displayed simply click the Contact People tab card to display the family contact details.
3. Click once on the SMS button displayed to the right of the Mobile telephone number.

The screenshot shows the 'Contact People' tab in the 'Contact People' section. It displays the 'Primary Contact' details for Martha Taylor, including her Name, Relationship (Mother), Email (computerize@xtra.co.nz), Default Telephone (0272222082), and Mobile (0272222082). The Mobile field has an SMS button next to it. Below the Primary Contact details is the 'Other Contact' section with fields for Name and Mobile.

4. The **Enter New SMS** dialog will be displayed on your screen.



**Create SMS**

Edit Tools

**Enter New SMS**

Message

Thank you for your enquiry, we look forward to meeting Ben tomorrow at 2pm

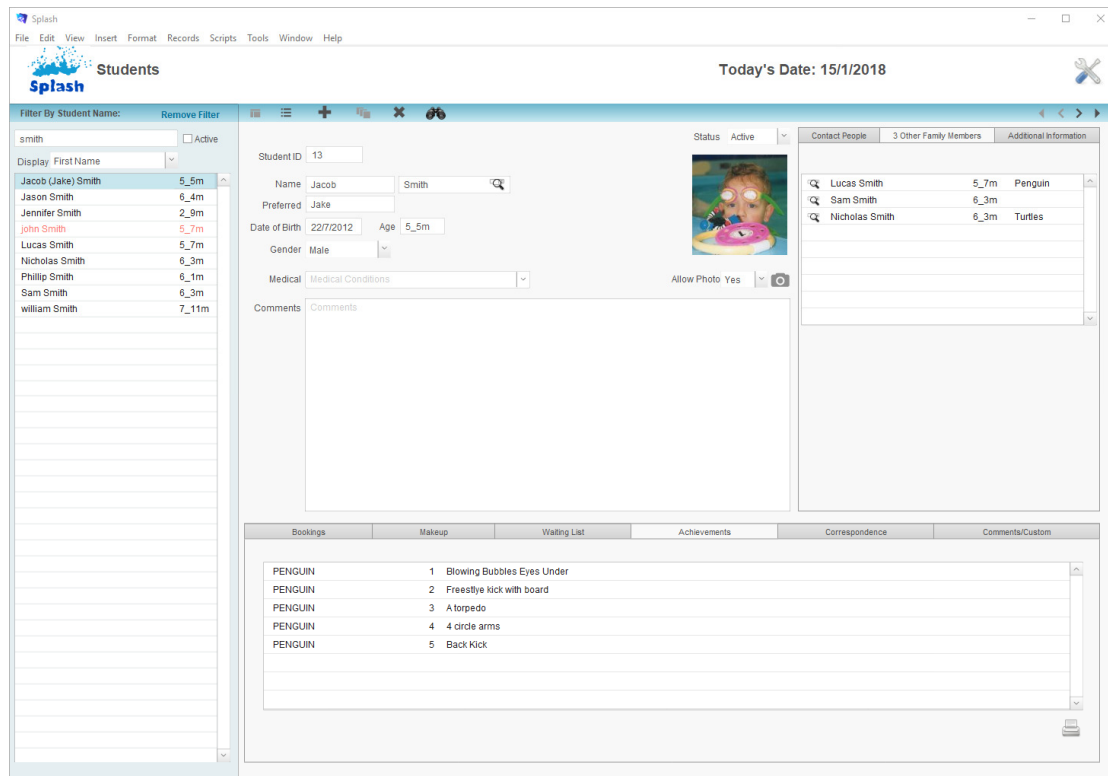
Message Length : 74 Chars

Cancel Done

5. Enter the message you wish to send.
6. Click the **Done** button to send your message and return to the student detail screen.

## Creating a Record of Achievement

1. Use the **Finding a Student** function to locate the required student record.
2. When the correct student is displayed on your screen; select the **Scripts** menu... choose **Send Record of Achievement**.



Splash

File Edit View Insert Format Records Scripts Tools Window Help

**Students** Today's Date: 15/1/2018

Filter By Student Name: Remove Filter

smith ☐ Active

Display First Name

|                    |       |
|--------------------|-------|
| Jacob (Jake) Smith | 5_5m  |
| Jason Smith        | 6_4m  |
| Jennifer Smith     | 2_9m  |
| John Smith         | 5_7m  |
| Lucas Smith        | 5_7m  |
| Nicholas Smith     | 6_3m  |
| Phillip Smith      | 6_1m  |
| Sam Smith          | 6_3m  |
| William Smith      | 7_11m |

Student ID 13

Name Jacob Smith

Preferred Jake

Date of Birth 22/7/2012 Age 5\_5m

Gender Male

Medical Medical Conditions

Comments

Status Active

Allow Photo Yes

Contact People 3 Other Family Members Additional Information

|                |      |         |
|----------------|------|---------|
| Lucas Smith    | 5_7m | Penguin |
| Sam Smith      | 6_3m |         |
| Nicholas Smith | 6_3m | Turtles |

Bookings Makeup Waiting List Achievements Correspondence Comments/Custom

|         |   |                            |
|---------|---|----------------------------|
| PENGUIN | 1 | Blowing Bubbles Eyes Under |
| PENGUIN | 2 | Freestyle kick with board  |
| PENGUIN | 3 | A torpedo                  |
| PENGUIN | 4 | 4 circle arms              |
| PENGUIN | 5 | Back Kick                  |

3. The report will be previewed on your screen. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



**Record of Achievement**

1 1 Total

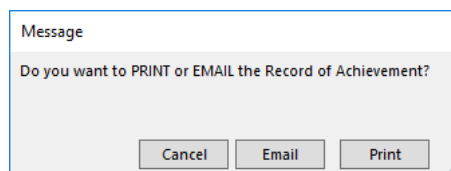
Pages

Save as Excel Save as PDF Print Print Setup

Layout: AC\_PRT Achievements ... View As: Exit Preview

Script paused **Continue**

4. The **Print Report** dialog will be displayed on your screen.




Message

Do you want to PRINT or EMAIL the Record of Achievement?


Cancel Email Print

- Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.



**YOUR SWIM SCHOOL NAME HERE**

, Wellington  
Telephone:



## Record of Achievement for Jake Smith

### Level 3 - Penguin

---

**1**    Blowing Bubbles Eyes Under

---

**2**    Freestyle kick with board

---

**3**    A torpedo

---

**4**    4 circle arms

---

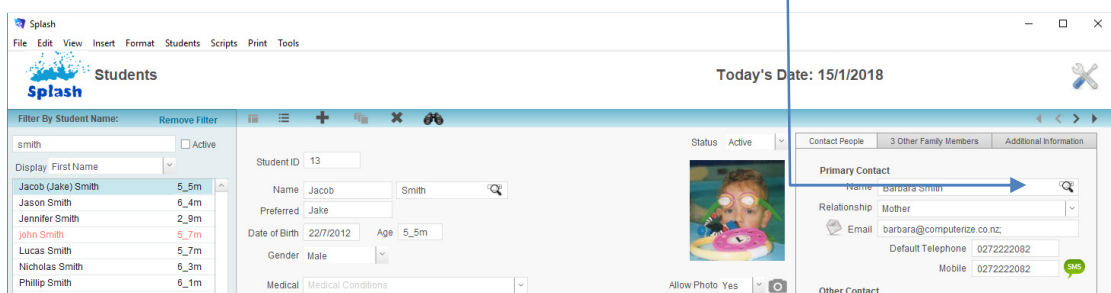
**5**    Back Kick

---

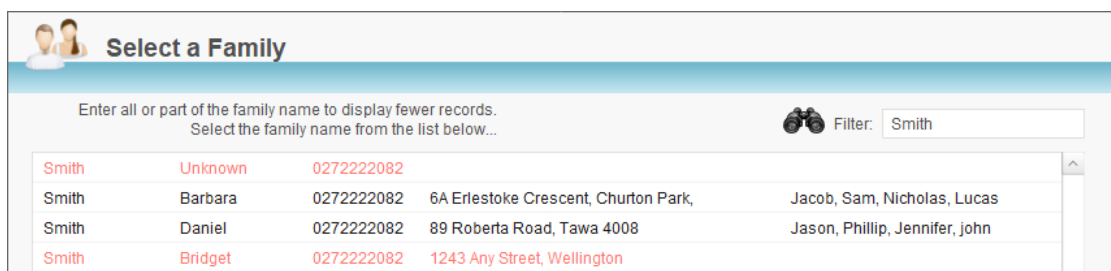
## Moving a Student from One Family to Another

Use these instructions when you have created a student record, however the student has accidentally been linked to the incorrect family file. Alternatively you may need to consolidate two family records where multiple children from the same family have been created under different family records.

- Use the **Finding a Student** function to locate the student record you wish to update.
- When the correct student screen click once on the **Contact People** tab card.
- Hold down the **Shift** key while you click the **magnifier** to the right of the primary contact name.



- The **Select a Family** dialog box will be displayed on your screen



| Family Name | Relationship | Phone      | Address                              | Children                       |
|-------------|--------------|------------|--------------------------------------|--------------------------------|
| Smith       | Unknown      | 0272222082 |                                      |                                |
| Smith       | Barbara      | 0272222082 | 6A Erlestoke Crescent, Churton Park, | Jacob, Sam, Nicholas, Lucas    |
| Smith       | Daniel       | 0272222082 | 89 Roberta Road, Tawa 4008           | Jason, Phillip, Jennifer, John |
| Smith       | Bridget      | 0272222082 | 1243 Any Street, Wellington          |                                |

5. The student surname will automatically be copied the filter field and all existing families with a matching surname will be displayed.
6. Simply click family you wish to move the child to.

## Deleting a Student Record

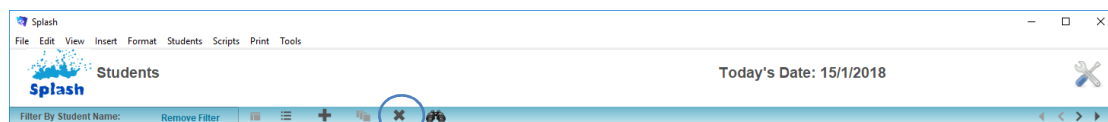
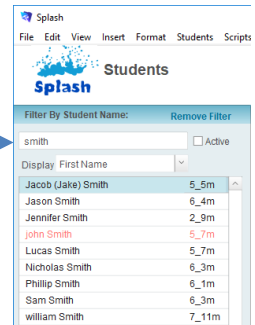
As a rule a record should only be deleted if it was made in error. To ensure data integrity a student record can only be deleted if there are no bookings. Student records can be deleted from either the Student entry screen or the list view.

### Deleting a Student

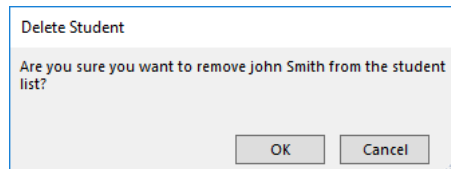
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Student** icon



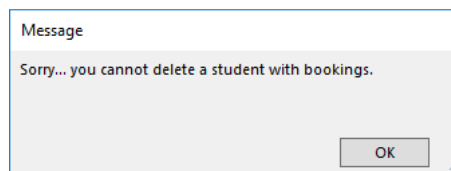
3. The Student data entry screen will be displayed, enter the name of the student you wish to remove in the filter field at the top of the portal list on the left of your screen.
4. Using the portal on the left of the screen, click once on student you wish to delete.
5. The portal row will be highlighted to indicate the active record. The details of the selected student will be displayed on the right of your screen.
6. Click once on the **Delete Student** button.



7. You will be asked to confirm the selected student is to be deleted.
8. A dialog will be displayed asking you to confirm the student record should be deleted.



9. Click **OK** to delete the record or **Cancel** to return to the student screen without making a change.



**NB:** You cannot delete a student with bookings attached.



## Generating Student Documents

The Correspondence tab card within the student file displays a list of all correspondence created for the selected student (with the exception of broadcast email or SMS messages).

1. Use the **Finding a Student** function to locate the student record you wish to create a document for.
2. Click once on the **Correspondence** tab card displayed on the lower right of the screen.

The screenshot shows the 'Students' window in the Splash application. On the left, a list of students is filtered by 'smith'. The main area displays the profile for 'Jacob (Jake) Smith' with fields for Name, Preferred Name, Date of Birth, Age, Gender, Medical Conditions, and Comments. On the right, contact information for 'Barbara Smith' (Mother) is shown, including email and phone numbers. At the bottom, a 'Correspondence' tab is active, displaying a table of correspondence items:

| Date     | Type    | Name          | Subject                                   |
|----------|---------|---------------|---|
| 11/01/18 | Letter  | Jacob Smith   | Happy Birthday                            |
| 11/01/18 | Booking | Barbara Smith | Swim School Multiple Booking Confirmation |

3. Click once on the **Add Correspondence** button to display the **Create Document** dialog box.

Create Correspondence 

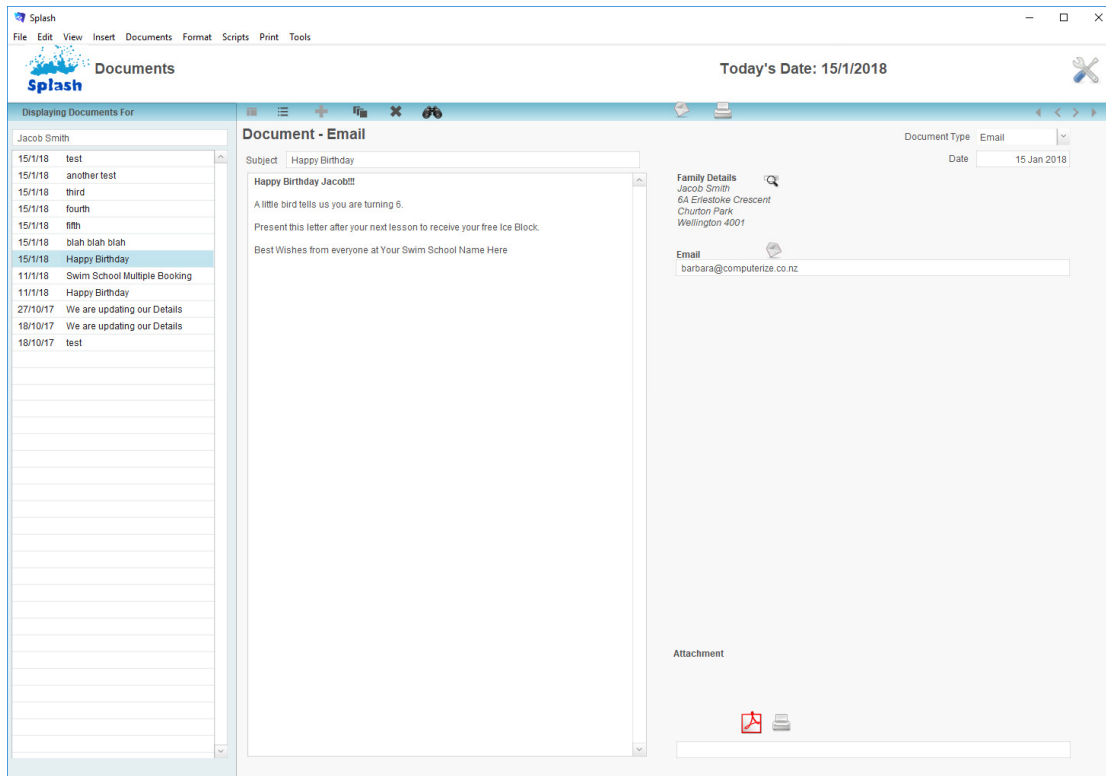
4. Choose the type of document you want to create and click the **Done** button.

The 'Create Document' dialog box is shown. It has a title bar and a close button. Below the title, it says 'Create New Document'. The main text asks 'Please select the type of document you would like to create'. A dropdown menu shows 'Email' selected. At the bottom, there are 'Cancel' and 'Done' buttons. The 'Done' button has a green checkmark icon.

5. The **Create New Document** dialog box will be displayed on your screen. Select the document you wish to use or click Use Blank Document and click **Done**.

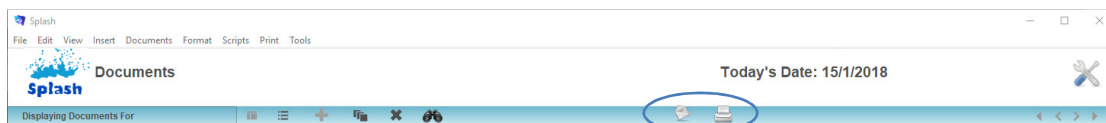
The 'Create Document' dialog box is shown. It has a title bar and a close button. Below the title, it says 'Create New Document'. The main text asks 'Please select the template you would like to use'. A dropdown menu shows 'Happy Birthday' selected. At the bottom, there are 'Cancel' and 'Done' buttons. The 'Done' button has a green checkmark icon.

6. The selected document will be displayed on your screen.



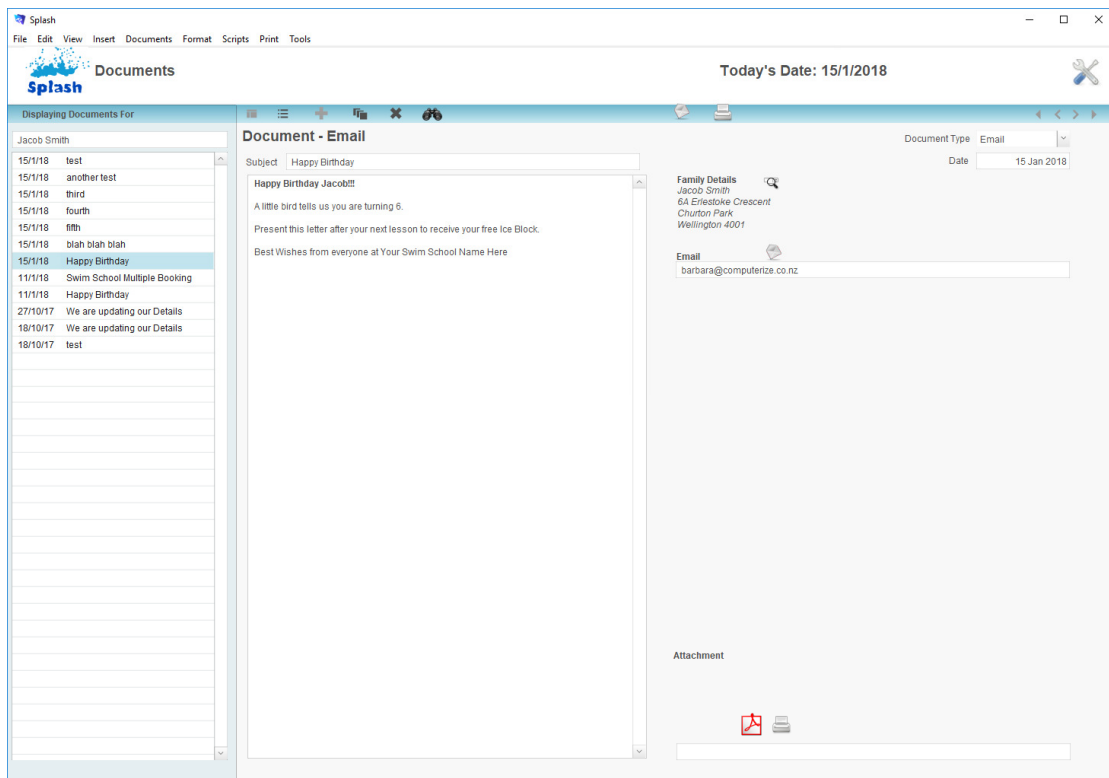
7. Edit the document as necessary.

8. Click the **Print** or **Email** button.



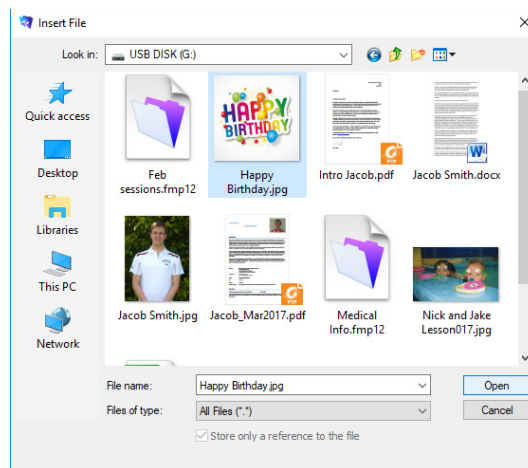
### **Adding an Attachment to an Email**

When an email is created you have the option of including an attachment with your message. Although the attachment icon is displayed as a pdf symbol any document type can be attached.

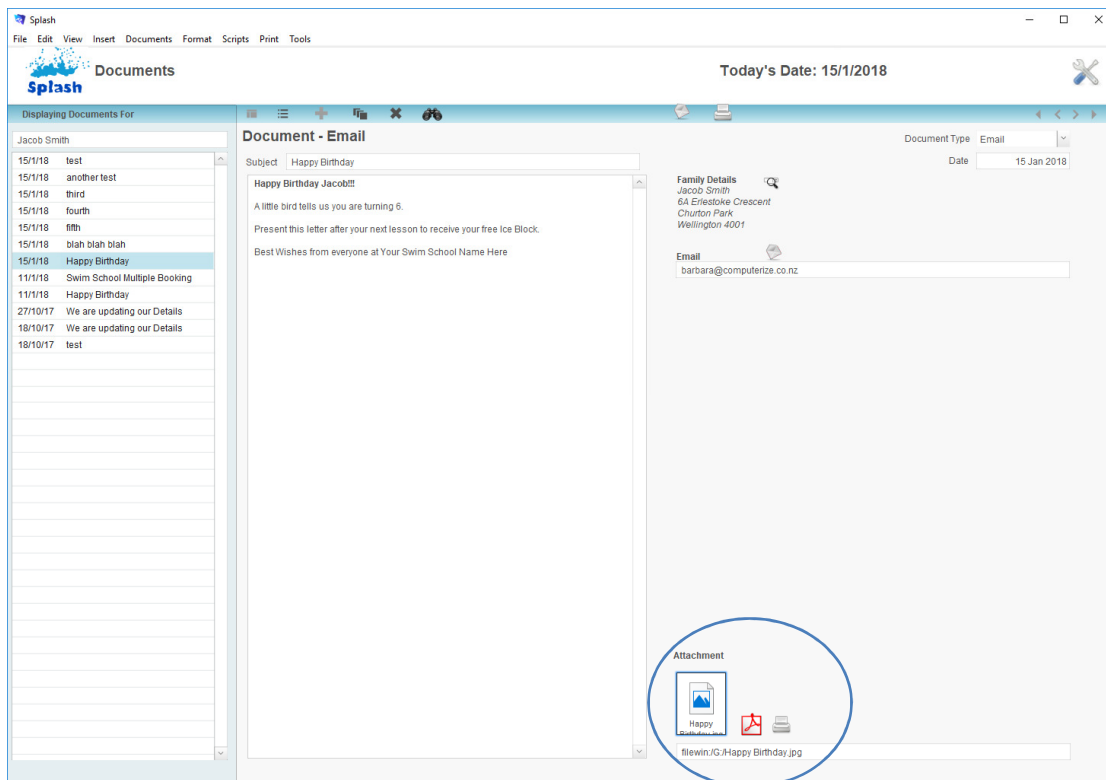


**NB:** The Attachment field and buttons are only displayed on screen for email documents.

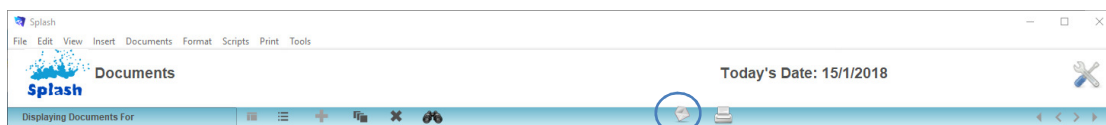
1. Ensure the correct email document is displayed on your screen.
2. Click once on the **Insert PDF** button.
3. The Insert File dialog will be displayed on your screen. Locate the file you wish to attach and click the Insert button.



4. The inserted document will appear in the Attachment field on the selected record.



5. Click the **Email** button.



**NB:** If you want to print the attachment double click the document icon to open it then choose print from the application it is displayed in.

## Changing the Status of a Student

Student records are all created with a status of Active. Over time however some students may leave the swim school either permanently or temporarily. Locating students based on term dates can be a little slower than using the active or inactive status field. After rollover and periodically during the term it is a good idea to update the student records to identify whether they are active or inactive. The following two commands reset the student status quickly for you.

### Changing a Group of Students to Active

This command identifies all students with a booking within a specified timeframe and sets the status to active. To use this command you simply need to know the start and end date of the current term.

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Student** icon



3. Select **Set Students with Bookings to Active** from the Scripts menu.
4. The Locate Current Students dialog will be displayed on your screen. Simply enter the start date and end date of the term and click the OK button.
5. Splash will locate all of the students with a booking within the specified dates and set their status to "Active".

6. A dialog will then be displayed asking if you wish to set all the remaining students to “Inactive”. Click OK if you wish to update the remaining records or Cancel to continue without amending the records.

### ***Changing a Group of Students to Inactive***

The reverse of the command above; this command identifies all students with a booking within a specified timeframe and sets the remaining students to a status to active. To use this command you simply need to know the start and end date of the current term.

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Student** icon



3. Select **Set Students without Bookings to Active** from the Scripts menu.
4. The Locate Current Students dialog will be displayed on your screen. Simply enter the start date and end date of the term and click the OK button.
5. Splash will hide all of the students with a booking within the specified dates and set the remaining records to status “Active”.

6. A dialog will then be displayed asking if you wish to set all the remaining students to “Active”. Click OK if you wish to update the remaining records or Cancel to continue without amending the records.

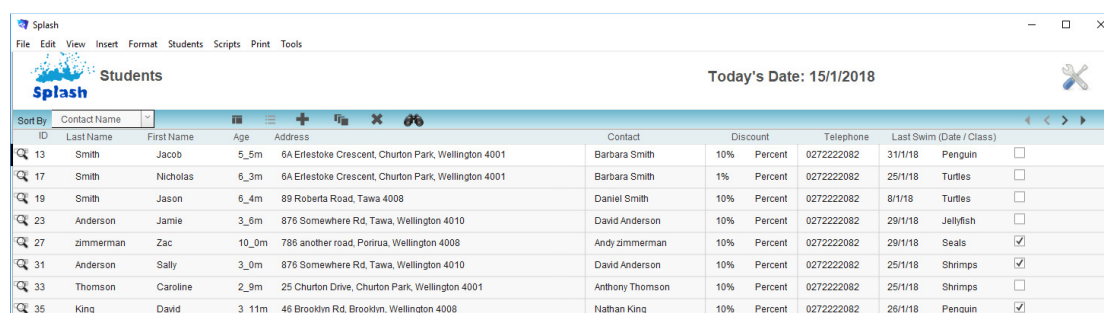
## Sending a Broadcast SMS Message

A broadcast SMS is a single message sent to multiple recipients. A SMS message sent in this way will not be recorded on the student or family file.

Group SMS messages are sent to all recipients in the found set who have a valid mobile telephone number stored on file.

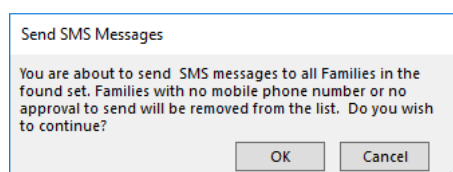
You can only send SMS messages if you have configured your system defaults to send SMS messages and you have created an account with SMSGlobal.

1. Use the **Finding a Student** function to locate the group of records you wish to send a message to. Locate only students with a mobile telephone number by placing an asterisk (\*) in the mobile field along with any other find criteria.
2. The found set of records will be displayed in a list on your screen (if the list is incorrect repeat step 1).

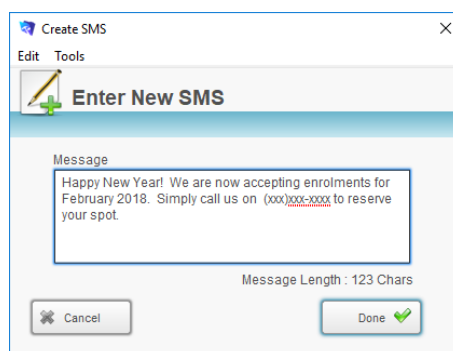


| ID | Last Name | First Name | Age   | Address  | Contact         | Discount | Telephone          | Last Swim (Date / Class)                            |
|----|-----------|------------|-------|--|-----------------|----------|--------------------|---|
| 13 | Smith     | Jacob      | 5_5m  | 6A Erlestoke Crescent, Churton Park, Wellington 4001 | Barbara Smith   | 10%      | Percent 0272222082 | 31/1/18 Penguin <input type="checkbox"/>            |
| 17 | Smith     | Nicholas   | 6_3m  | 6A Erlestoke Crescent, Churton Park, Wellington 4001 | Barbara Smith   | 1%       | Percent 0272222082 | 25/1/18 Turtles <input type="checkbox"/>            |
| 19 | Smith     | Jason      | 6_4m  | 89 Roberta Road, Tawa 4008                           | Daniel Smith    | 10%      | Percent 0272222082 | 8/1/18 Turtles <input type="checkbox"/>             |
| 23 | Anderson  | Jamie      | 3_6m  | 876 Somewhere Rd, Tawa, Wellington 4010              | David Anderson  | 10%      | Percent 0272222082 | 29/1/18 Jellyfish <input type="checkbox"/>          |
| 27 | zimmerman | Zac        | 10_0m | 786 another road, Porirua, Wellington 4008           | Andy zimmerman  | 10%      | Percent 0272222082 | 29/1/18 Seals <input checked="" type="checkbox"/>   |
| 31 | Anderson  | Sally      | 3_0m  | 876 Somewhere Rd, Tawa, Wellington 4010              | David Anderson  | 10%      | Percent 0272222082 | 25/1/18 Shrimps <input checked="" type="checkbox"/> |
| 33 | Thomson   | Caroline   | 2_9m  | 25 Churton Drive, Churton Park, Wellington 4001      | Anthony Thomson | 10%      | Percent 0272222082 | 25/1/18 Shrimps <input type="checkbox"/>            |
| 35 | King      | David      | 3_11m | 46 Brooklyn Rd, Brooklyn, Wellington 4008            | Nathan King     | 10%      | Percent 0272222082 | 26/1/18 Penguin <input checked="" type="checkbox"/> |

3. Select the **Scripts** menu... choose **Send SMS...**choose **Send SMS to Family [Found Set]**.
4. A dialog will be displayed on your screen warning that you are about to send multiple SMS messages. Click **OK** to continue or Cancel or exit the script.



5. The **Enter New SMS** dialog will be displayed on your screen.



6. Enter the message you wish to send.
7. Click the **Done** button to send your message and return to the student entry screen.

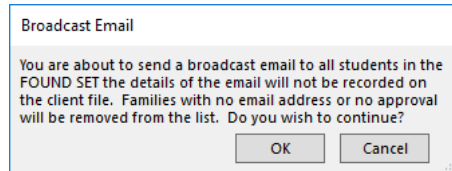
**NB:** Each SMS message is sent via your default email application.

## Sending a Broadcast Email

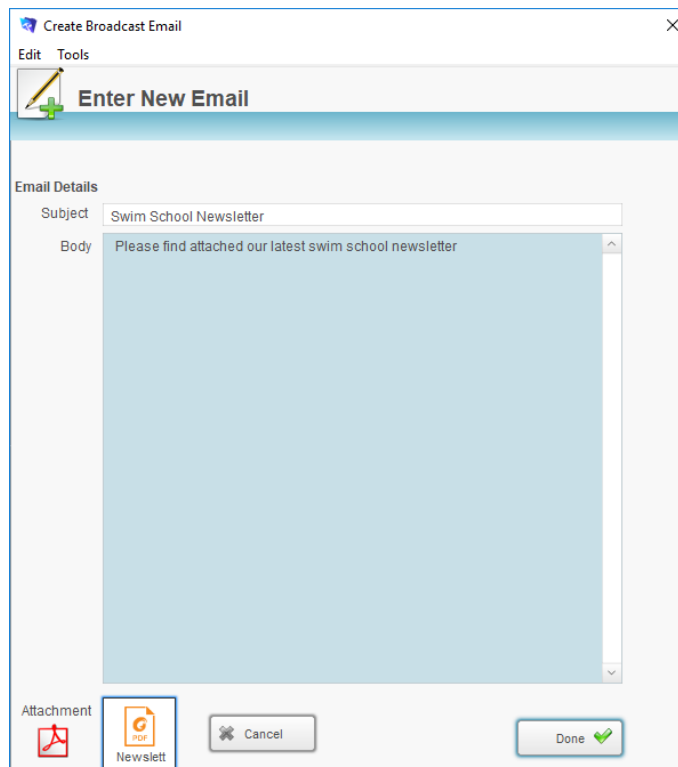
A broadcast email is a single email sent to multiple recipients. An email sent in this way will not be recorded on the family file.

Group email messages are sent to all recipients in the found set that have a valid email address stored on file.

1. Use the **Finding a Student** function to locate the group of records you wish to send a message to. Locate only students with an email address by placing an asterisk (\*) in the email field along with any other find criteria.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Send Broadcast Email** from the **Scripts** Menu.



4. A dialog will be displayed on your screen warning that you are about to send multiple email messages. Click **OK** to continue or Cancel to exit the script.
5. The **Enter Broadcast Email** dialog will be displayed on your screen.



6. Enter the message you wish to send and attach a document if required.
7. Click the **Done** button.

**NB:** To ensure the privacy of all clients each email address will be placed in the BCC box. You can view the messages that have been sent by looking in the Sent Items folder of your default email application.

## Generating a Student Mail Merge

The mail merge function in Splash operates using a marked record system. All marked records will be included in the mail merge. Marked students appear in the Student listing with a tick in the box on the far right of the screen.

Splash

File Edit View Insert Format Students Scripts Print Tools

Students

Today's Date: 15/1/2018

Sort By

Contact Name

Last Name

First Name

Age

Address

Contact

Discount

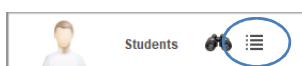
Telephone

Last Swim (Date / Class)

| ID | Last Name   | First Name | Age   | Address  | Contact          | Discount | Telephone | Last Swim (Date / Class) |                   |                                     |
|----|-------------|------------|-------|--|------------------|----------|-----------|--------------------------|-------------------|-------------------------------------|
| 13 | Smith       | Jacob      | 5_5m  | 6A Eriestoke Crescent, Churton Park, Wellington 4001 | Barbara Smith    | 10%      | Percent   | 0272222082               | 31/1/18 Penguin   | <input type="checkbox"/>            |
| 17 | Smith       | Nicholas   | 6_3m  | 6A Eriestoke Crescent, Churton Park, Wellington 4001 | Barbara Smith    | 1%       | Percent   | 0272222082               | 25/1/18 Turtles   | <input type="checkbox"/>            |
| 19 | Smith       | Jason      | 6_4m  | 89 Roberta Road, Tawa 4008                           | Daniel Smith     | 10%      | Percent   | 0272222082               | 8/1/18 Turtles    | <input type="checkbox"/>            |
| 23 | Anderson    | Jamie      | 3_6m  | 876 Somewhere Rd, Tawa, Wellington 4010              | David Anderson   | 10%      | Percent   | 0272222082               | 29/1/18 Jellyfish | <input type="checkbox"/>            |
| 27 | zimmerman   | Zac        | 10_0m | 786 another road, Porirua, Wellington 4008           | Andy zimmerman   | 10%      | Percent   | 0272222082               | 29/1/18 Shrimps   | <input checked="" type="checkbox"/> |
| 31 | Anderson    | Sally      | 3_0m  | 876 Somewhere Rd, Tawa, Wellington 4010              | David Anderson   | 10%      | Percent   | 0272222082               | 25/1/18 Shrimps   | <input checked="" type="checkbox"/> |
| 33 | Thomson     | Caroline   | 2_9m  | 25 Churton Drive, Churton Park, Wellington 4001      | Anthony Thomson  | 10%      | Percent   | 0272222082               | 25/1/18 Shrimps   | <input type="checkbox"/>            |
| 35 | King        | David      | 3_11m | 46 Brooklyn Rd, Brooklyn, Wellington 4008            | Nathan King      | 10%      | Percent   | 0272222082               | 26/1/18 Penguin   | <input checked="" type="checkbox"/> |
| 39 | White       | Jane       | 7_1m  | 76 Moorefield Road, Johnsonville, Wellington 4001    | Julie White      | 10%      | Percent   | 0272222082               | 30/1/18 Starfish  | <input checked="" type="checkbox"/> |
| 41 | Smith       | Phillip    | 6_1m  | 89 Roberta Road, Tawa 4008                           | Daniel Smith     | 10%      | Percent   | 0272222082               | 29/1/18 Penguin   | <input checked="" type="checkbox"/> |
| 43 | Fairbrother | Jonathan   | 3_3m  | 56 Watt St, Tahiti Bay, Wellington 4012              | Mark Fairbrother | 10%      | Percent   | 0272222082               | 30/1/18 Jellyfish | <input type="checkbox"/>            |

Creating a mail merge is a two-step process; the first step involves identifying the students you wish to receive the merge document, the second step involves creating the document you wish to send.

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Student List** icon

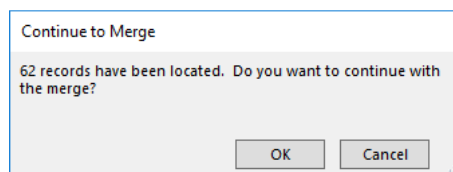


3. The Student List View screen will be displayed.
4. Click once on the **Find Marked** button displayed at the bottom right of the screen. This command will display a list of all students that are currently marked.
5. Click once on the **Unmarked Found Set** button. This will clear all settings for previously marked records.



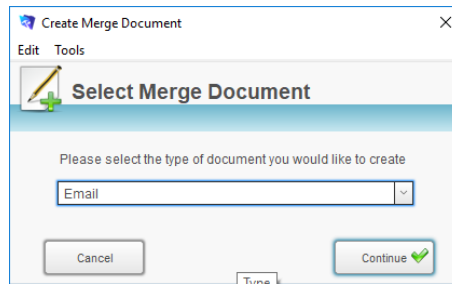
| Displaying found set (62 out of 98) | Find Marked | Unmark Found Set | Mark Found Set |
|-------------------------------------|-------------|------------------|----------------|
|-------------------------------------|-------------|------------------|----------------|

6. Use the **Finding a Student** function to locate the group of records you wish to send a message to.
7. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 4)
8. Click once on the **Mark Found Set** button to select the records for the mail merge. A cross should appear for each student in the Mark column on the right of the screen.
9. Repeat steps 4 to 6 above until all required students have been marked.
10. Select **Perform Mail Merge** from the Scripts menu.
11. A dialog will be displayed advising the number of records which have been selected for the mail merge. Click OK if this number is correct, or click Cancel to exit the script and begin again at step 1.



12. The **Create Merge Document** dialog will be displayed asking you to define the type of document you wish to create. Select the required type of document from the drop-down menu provided.

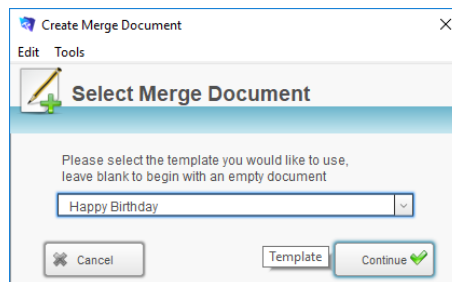




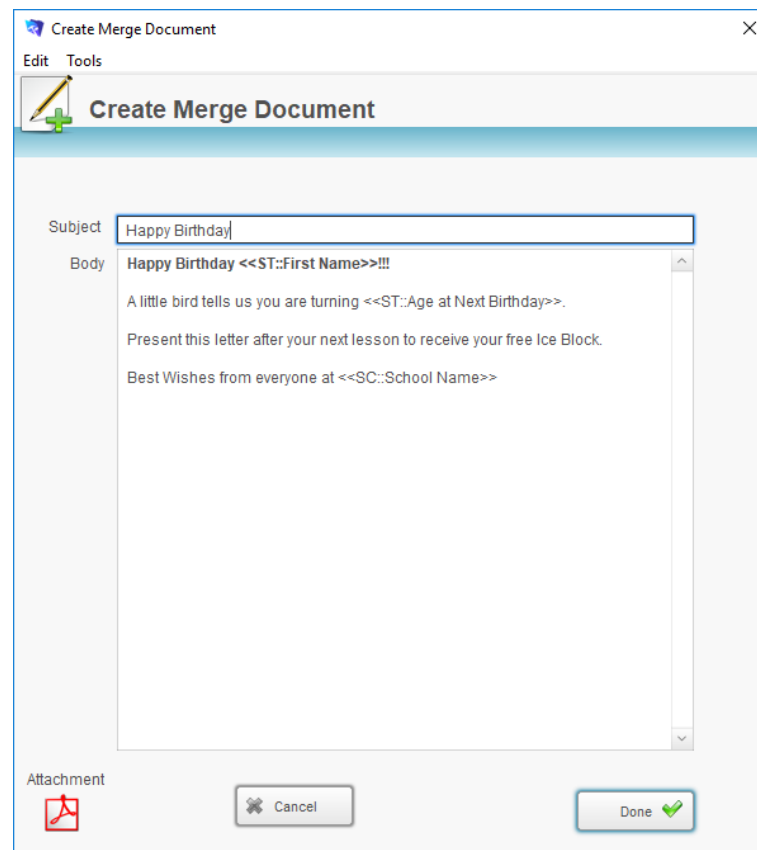
13. Click the **Continue** button.

14. The **Create Merge Document** dialog box will be displayed on your screen. Select the template you wish to use or click Use Blank Document

15. Click the **Continue** button.



16. The selected template will be displayed on your screen. Edit the content of the template as required.



17. Click the **Done** button to complete the merge or Cancel to exit the script with making a change.

**NB:** If Done was selected at step 17 a personalised document will be created for each family, it will automatically be printed or emailed. A copy of each document will be placed on the each family record.

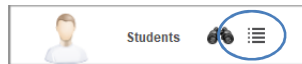
## Importing Student Data

When you import data, you're bringing data from another file into Splash. When you import data into an existing FileMaker Pro file, you can:

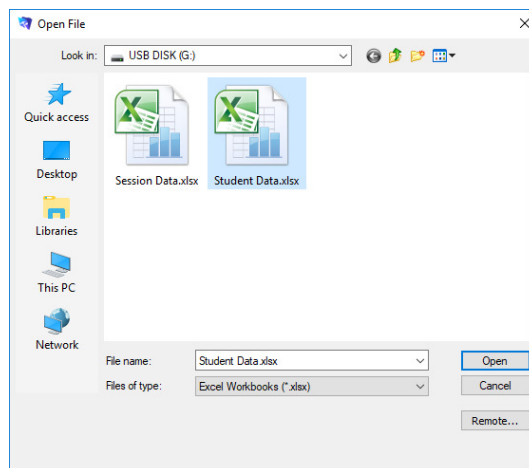
- add new records from the source file
- update records with information from the source file
- update matching records with information from the source file

### Importing Records from Excel

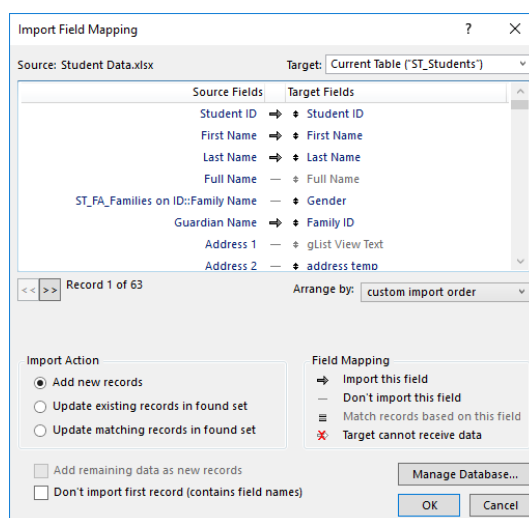
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Students List** icon



3. The Student List View screen will be displayed.
4. Select **Import Student Data** from the **Scripts** menu.
5. The **Open File** dialog will be displayed on your screen.
6. Locate the file containing the data you wish to import and click the **Open** button.



7. The Import Field Mapping dialog will be displayed on your screen.





8. In the **Import Action** area, choose the type of import to perform.  
To add new records to the end of the target file – select **Add New Records**  
To update the found set of records in the target file with the records you're importing – select **Update existing records in found set**.

To update data in the target file with the data from matching records in the source – select **Update matching records in the found set**.

9. If the first record of the data you're importing contains field names (column headings) instead of data, select Don't import first record (contains field names).

Selecting Don't import first record (contains field names) skips the first record during import.

10. Drag fields in the Target Field column to align with fields in the Source Field column to indicate where data will be imported or updated.

To align a field, move the pointer over the  icon next to a target field name in the list. When the pointer changes to a double arrow , drag the field to a new location.

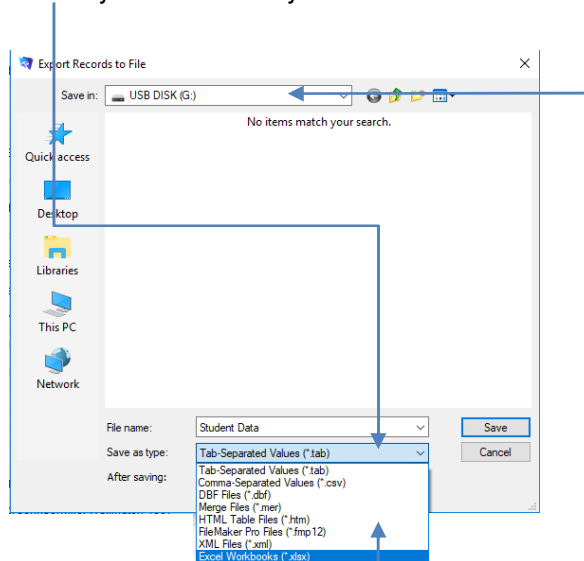
11. When all fields have been aligned correctly, click the **Import** button.

## Exporting Student Data

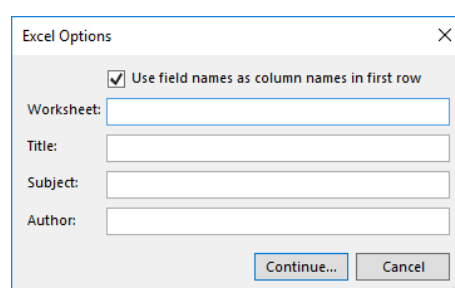
You can export Splash data to a new file and then open it in another application. For example, you can export Splash data as a spreadsheet for use in Microsoft Excel. Use the export function when you want to export records in the found set of records.

### Exporting Records to Excel

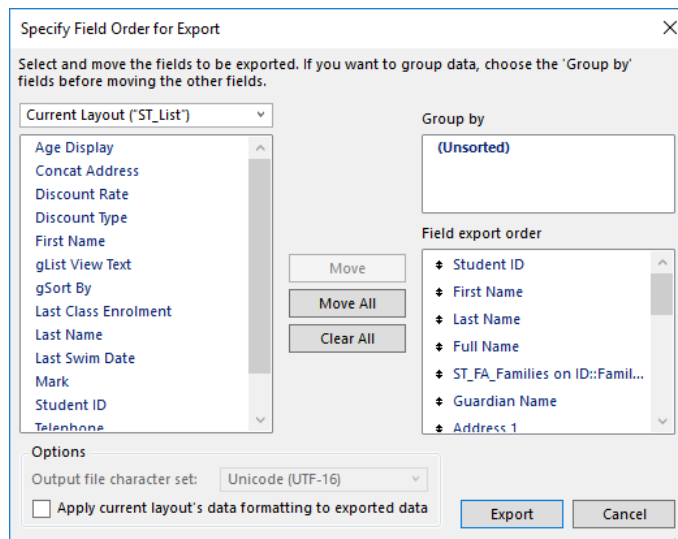
1. Use the **Finding a Student** function to locate the group of records you wish to export.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Export Student Data** from the **Scripts** menu.
4. The **Export Records to File** dialog will be displayed on your screen.
5. Enter the name you wish to call your file and choose a location to store the file.



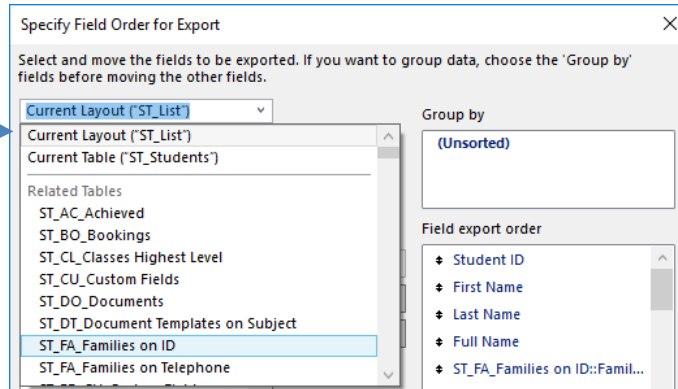
6. Choose a file type from the **Save as Type (Type)** field and click the **Save** button.
7. The Excel Options dialog box will be displayed on your screen. If you wish to name the worksheet the data is being exported to enter it in the Worksheet field. Click **Continue**.



8. The **Specify Field Order for Export** dialog will be displayed on your screen. Use this dialog to indicate the order of the fields in which Splash will export the data.
9. All fields displayed in the **Field Export Order** list will be exported.
10. To move a field to the **Field Export Order** simply double-click the field name on the left of the screen.



11. To include a related field choose the name of the related table from the list in the upper left of the dialog, then double-click the required field.



12. When all the required fields are displayed in the Field Export Order list click the **Export** button.

13. The Excel file will be saved to your computer ready for use.

| Student ID |            |            |             |                      |                             |                  |                       |              |              |           |            |           |
|------------|------------|------------|-------------|----------------------|-----------------------------|------------------|-----------------------|--------------|--------------|-----------|------------|-----------|
|            | Student ID | First Name | Last Name   | Full Name            | FA_Families on ID::Family N | Guardian Name    | Address 1             | Address 2    | Address 3    | Address 4 | Address 5  | Address 6 |
| 1          | 13         | Jacob      | Smith       | Jacob (Jake) Smith   | Smith                       | Barbara Smith    | 6A Erlestoke Crescent |              | Churton Park |           | Wellington |           |
| 2          | 17         | Nicholas   | Smith       | Nicholas Smith       | Smith                       | Barbara Smith    | 6A Erlestoke Crescent |              | Churton Park |           | Wellington |           |
| 3          | 19         | Jason      | Smith       | Jason Smith          | Smith                       | Daniel Smith     | 89 Roberta Road       | Tawa         |              |           | Wellington |           |
| 4          | 23         | Jamie      | Anderson    | Jamie Anderson       | Anderson                    | David Anderson   | 876 Somewhere Rd      |              |              |           | Wellington |           |
| 5          | 27         | Zac        | zimmerman   | Zac zimmerman        | zimmerman                   | Andy zimmerman   | 786 another road      | Porirua      |              |           | Wellington |           |
| 6          | 31         | Sally      | Anderson    | Sally Anderson       | Anderson                    | David Anderson   | 876 Somewhere Rd      | Tawa         |              |           | Wellington |           |
| 7          | 33         | Caroline   | Thomson     | Caroline Thomson     | Thomson                     | Anthony Thomson  | 25 Churton Drive      | Churton Park |              |           | Wellington |           |
| 8          | 35         | David      | King        | David King           | King                        | Nathan King      | 46 Brooklyn Rd        | Brooklyn     |              |           | Wellington |           |
| 9          | 39         | Jane       | White       | Jane White           | White                       | Julie White      | 76 Moorefield Road    | Johnsonville |              |           | Wellington |           |
| 10         | 41         | Phillip    | Smith       | Phillip Smith        | Smith                       | Daniel Smith     | 89 Roberta Road       | Tawa         |              |           | Wellington |           |
| 11         | 43         | Jonathan   | Fairbrother | Jonathan Fairbrother | Fairbrother                 | Mark Fairbrother | 56 Watt St            | Tatahi Bay   |              |           | Wellington |           |
| 12         | 45         | Stephanie  | Hughson     | Stephanie Hughson    | Hughson                     | Ngaire Hughson   | 98 Barrett St         | Ngaio        |              |           | Wellington |           |

## Printing Student Reports

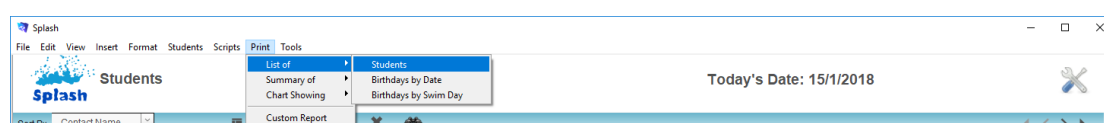
You must be in the Student module of Splash to generate the following reports: All reports are displayed in the Print menu.

### Printing a List of Students

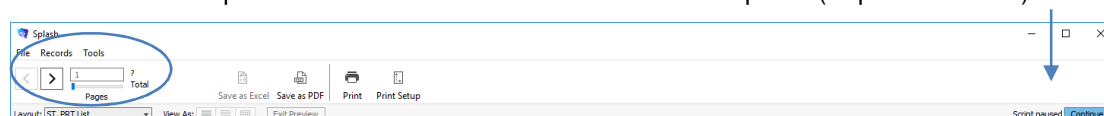
This report provides a listing of student ID, address and contact details, it should be printed and kept as a reference guide and backup of your system.

This report provides a listing of family ID, address and contact details, it should be printed and kept as a reference guide for making bookings.

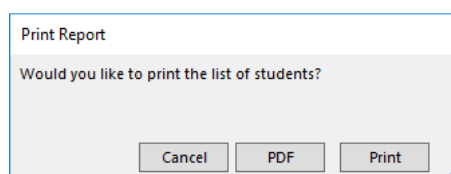
1. Use the **Finding a Student** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **List of ...** from the Print menu and select **Students** from the pop-out menu displayed.



4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



5. The **Print Report** dialog will be displayed on your screen.



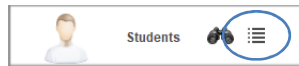
6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

| List of Students     |  |            | Last Swim | Last Class | Total Number of Bookings |
|----------------------|--|------------|-----------|------------|--------------------------|
| Amanda Brown         | 345 Nowhere St, Brooklyn, Wellington 4009        | 0272222082 | 28/1/18   | Penguin    | 1                        |
| Anthony Apollo       | 78 Youngs Road, Tauranga 7902                    | 0272222082 | 25/1/18   | Turtles    | 8                        |
| Barry Robinson       | 46 Hillcrest Road, Johnsonville, Wellington 4007 | 0272222082 | 31/1/18   | Penguin    | 1                        |
| Benjamin Nightingale | 15 Albert St, Redwood, Wellington 4010           | 0272222082 | 31/1/18   | Penguin    | 1                        |
| Benjamin Williams    | 171 Chapel St, Khandallah, Wellington 4005       | 0272222082 | 25/1/18   | Turtles    | 8                        |
| Billy Jones          | 123 Any St, Wellington                           | 0272222082 | 29/1/18   | Turtles    | 12                       |
| Bobby Thomson        | 25 Churton Drive, Churton Park, Wellington 4001  | 0272222082 | 26/1/18   | Starfish   | 1                        |
| brenda thomas        | 123 any st                                       | 0272222082 | 28/1/18   | Penguin    | 1                        |
| Bridgette Robinson   | 46 Hillcrest Road, Johnsonville, Wellington 4007 | 0272222082 | 26/1/18   | Seals      | 1                        |
| Bruce Taylor         | 79 Main St, Tawa, Wellington 4010                | 0272222082 | 25/1/18   | Shrimps    | 8                        |
| Caroline Thomson     | 25 Churton Drive, Churton Park, Wellington 4001  | 0272222082 | 25/1/18   | Shrimps    | 8                        |
| Corey Morrison       | 8 Victoria St, Redwood, Wellington 4010          | 0272222082 | 29/1/18   | Jellyfish  | 1                        |
| Craig King           | 46 Brooklyn Rd, Brooklyn, Wellington 4008        | 0272222082 | 25/1/18   | Seals      | 8                        |
| David King           | 46 Brooklyn Rd, Brooklyn, Wellington 4008        | 0272222082 | 26/1/18   | Penguin    | 8                        |

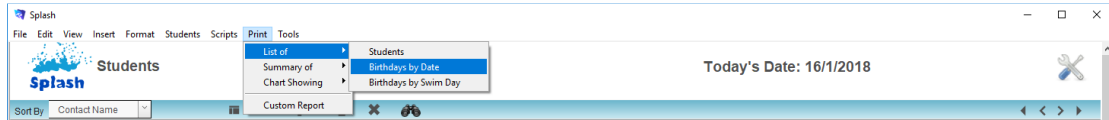
### Printing a Birthday List by Date

This report displays a list of student birthdays. The report will be sorted by the date of each child's birthday.

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Students List** icon



3. The Student List View screen will be displayed.
4. Select **List of ...** from the Print menu and select **Birthdays by Date** from the pop-out menu displayed.



5. The Locate Birthdays dialog will be displayed on your screen. Enter the Month Name, Date(days) of the month, and age criteria for who should be included in the report..

Locate Birthdays

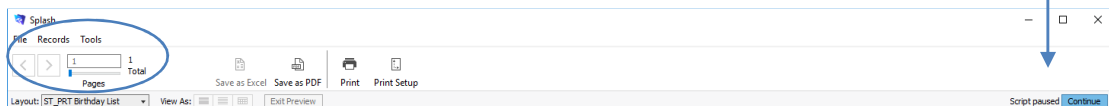
Please enter the date range you wish to locate.

Month Name

Date of Month (use ... to specify a range)

Age (enter < to specify a range)

6. Click OK to locate the swimmers with birthdays and preview the report.
7. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



8. The **Print Report** dialog will be displayed on your screen.

Print Report

Would you like to print the list of student birthdays?

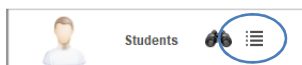
9. Click OK to print the report or Cancel to return to your original screen without printing.

| List of Student Birthdays |                   |            |   |                        |
|---------------------------|-------------------|------------|---|------------------------|
| May                       |                   |            |   |                        |
| 1 st                      | Anthony Beauchamp | is turning | 8 | Mon @ 5:15 PM Seals    |
| 1 st                      | Billy Jones       | is turning | 6 | Mon @ 4:00 PM Turtles  |
| 1 st                      | Paul Fairbrother  | is turning | 9 | Thu @ 3:45 PM Seals    |
| 7 th                      | Robert Harper     | is turning | 6 | Thu @ 10:00 AM Turtles |
| 22 nd                     | Melanie McArthur  | is turning | 3 | Wed @ 3:30 PM Penguin  |

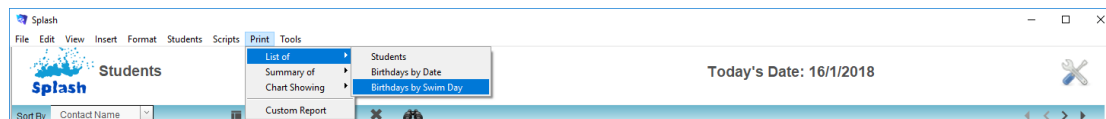
### Printing a Birthday List by Swim Day

This report displays a list of student birthdays. The students in the report are grouped by the day each child swims.

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Students List** icon



3. The Student List View screen will be displayed.
4. Select **List of ...** from the Print menu and select **Birthdays by Swim Day** from the pop-out menu displayed.



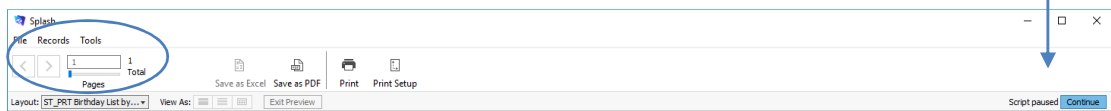
5. The Locate Birthdays dialog will be displayed on your screen. Enter the Month Name, Date (days) of the month, and age criteria for who should be included in the report..

A screenshot of the 'Locate Birthdays' dialog box. The dialog box has a title bar 'Locate Birthdays' and a message 'Please enter the date range you wish to locate.' Below the message are three input fields: 'Month Name' with 'May' entered, 'Date of Month (use ... to specify a range)' with '1...31' entered, and 'Age (enter < to specify a range)' with '<15' entered. At the bottom right are 'Cancel' and 'OK' buttons.

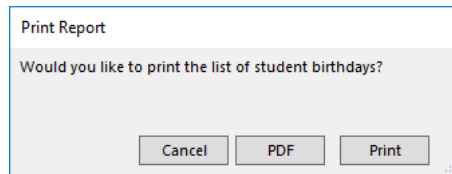
6. Click OK to locate the swimmers with birthdays and preview the report.



- The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



- The **Print Report** dialog will be displayed on your screen.



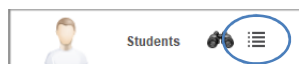
- Click OK to print the report or Cancel to return to your original screen without printing.

| List of Student Birthdays |                   |              |          |                 |
|---------------------------|-------------------|--------------|----------|-----------------|
| May                       |                   |              |          |                 |
| Swims on Monday           |                   |              |          |                 |
| 1 st                      | Billy Jones       | is turning 6 | 4:00 PM  | Turtles with BR |
| 1 st                      | Anthony Beauchamp | is turning 8 | 5:15 PM  | Seals with TBA  |
| Swims on Wednesday        |                   |              |          |                 |
| 22 nd                     | Melanie McArthur  | is turning 3 | 3:30 PM  | Penguin with LW |
| Swims on Thursday         |                   |              |          |                 |
| 7 th                      | Robert Harper     | is turning 6 | 10:00 AM | Turtles with DS |
| 1 st                      | Paul Fairbrother  | is turning 9 | 3:45 PM  | Seals with TBA  |

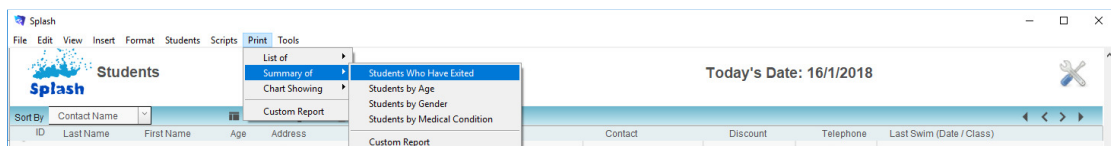
### Printing a Summary of Students Who Have Exited

This report displays a list of students whose last booking was within a specified timeframe. This search compares the last booking date which is stored on the client file with the date range you have specified.

- Click once on the **Splash** icon on the top left corner of your screen.
- Select the **Students List** icon



- The Student List View screen will be displayed.
- Select **Summary of ...** from the Print menu and select **Students by Date Exited** from the pop-out menu displayed.



- The Specify Dates for Reporting dialog will be displayed on your screen. Start Date and End Date criteria for who should be included in the report..

**Specify Dates for Reporting**

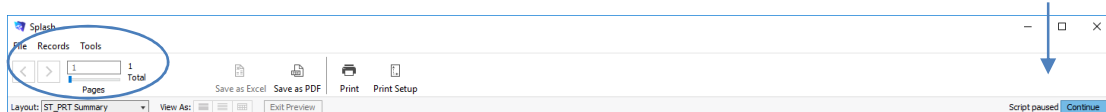
Please specify the start and end date for the reporting period.

Start Date  
1/12/17

End Date  
31/12/17

Cancel OK

- Click OK to locate the swimmers exited in the specified timeframe and preview the report.
- The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



- The **Print Report** dialog will be displayed on your screen.

**Print Report**

Would you like to print the Summary of Exits?

Cancel PDF OK

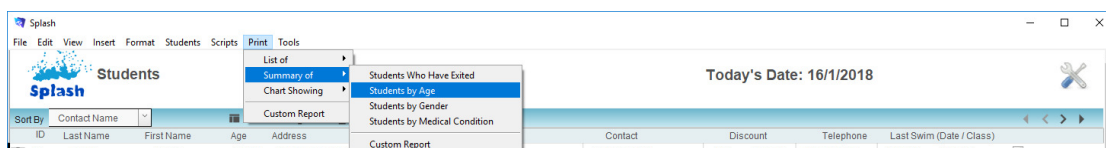
- Click OK to print the report or Cancel to return to your original screen without printing.

| Summary of Students<br>Summary of Exits |                       |                       |
|---|-----------------------|-----------------------|
|   | Number<br>of Students | Number<br>of Bookings |
| <b>Friday</b>                           | <b>1</b>              | <b>6</b>              |
| Penguin                                 | 1                     | 6                     |
| <b>Monday</b>                           | <b>1</b>              | <b>1</b>              |
| Seals                                   | 1                     | 1                     |
| <b>Total Reported</b>                   | <b>2</b>              | <b>7</b>              |

### Printing a Summary of Students by Age

This report displays a list of students by current age. The report will include a summary of all records in the found set.

- Use the **Finding a Student** function to locate the group of records you wish to include in your report.
- The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
- Select **Summary of ...** from the Print menu and select **Students by Age** from the pop-out menu displayed.



4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.  
 Step 1 = Summary by Age  
 Step 2 = Group 1 set to Summarize by Age  
 Step 3 = Report Name set to Summary by Age
6. Amend any of the above steps or include additional grouping options at Step 2.
7. Click the OK button.

8. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).

9. The **Print Report** dialog will be displayed on your screen.

10. Click OK to print the report or Cancel to return to your original screen without printing.

## Summary of Students

Summary by Age

|                       | Number<br>of Students | Number<br>of Bookings |
|-----------------------|-----------------------|-----------------------|
| 2 Years               | 12                    | 58                    |
| 3 Years               | 14                    | 49                    |
| 4 Years               | 7                     | 28                    |
| 5 Years               | 12                    | 102                   |
| 6 Years               | 6                     | 41                    |
| 7 Years               | 4                     | 32                    |
| 8 Years               | 5                     | 40                    |
| 9 Years               | 1                     | 8                     |
| <b>Total Reported</b> | <b>61</b>             | <b>358</b>            |

**NB:** To include a list of student names, click Show Detail at Step 2.

### Step 2: Choose/Update Report Summary Groups

Group 1 Summarize by Age

Group 2

Group 3

Show Detail ☐

## Summary of Students

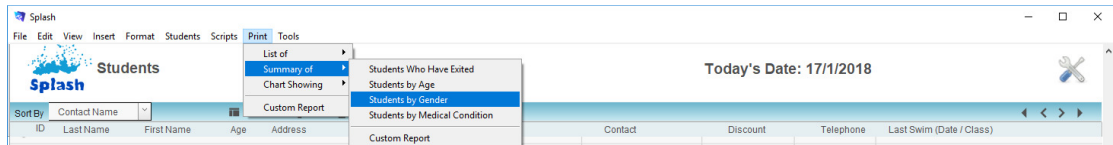
Summary by Age

|                      |   | Number<br>of Students | Number<br>of Bookings |
|----------------------|---|-----------------------|-----------------------|
| <b>2 Years</b>       |   | <b>12</b>             | <b>1</b>              |
| Benjamin Nightingale | 15 Albert St, Redwood, Wellington 4010          | 0272222082            | 1                     |
| brenda thomas        | 123 any st                                      | 0272222082            | 1                     |
| Caroline Thomson     | 25 Churton Drive, Churton Park, Wellington 4001 | 0272222082            | 8                     |
| james gill           |   |                       | 1                     |
| Jennifer Smith       | 89 Roberta Road, Tawa 4008                      | 0272222082            | 8                     |
| Jessica Sinclair     | 3 Main St, Tawa, Wellington 4010                | 0272222082            | 8                     |
| Joanne Jones         | 123 Any St, Wellington                          | 0272222082            | 12                    |
| Melanie McArthur     | 39 River Road, Kelson, Wellington 4008          | 04 566 7894           | 1                     |
| Nathan Solomon       | 67 Watkins Rd, Churton Park, Wellington 4001    | 0272222082            | 1                     |
| Peter Apollo         | 78 Youngs Road, Tauranga 7902                   | 0272222082            | 8                     |
| sam jones            | 123 Any St, Wellington                          | 0272222082            | 1                     |
| stuart pearson       | 456 Any St, Wellington 4000                     | 0272222082            | 8                     |

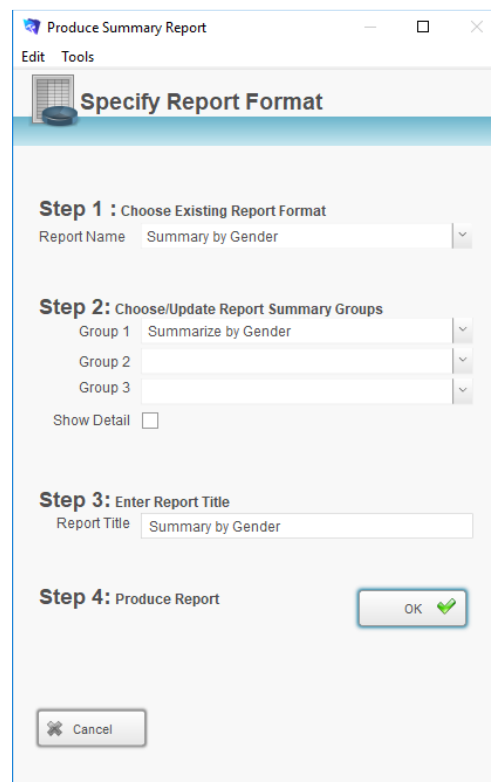
### Printing a Summary of Students by Gender

This report displays a list of students by gender. The report will include a summary of all records in the found set.

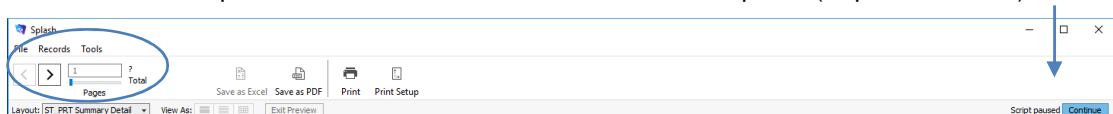
1. Use the **Finding a Student** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of ...** from the Print menu and select **Students by Gender** from the pop-out menu displayed.



4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.  
Step 1 = Summary by Gender  
Step 2 = Group 1 set to Summarize by Gender  
Step 3 = Report Name set to Summary by Gender
6. Amend any of the above steps or include additional grouping options at Step 2.
7. Click the OK button.



8. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



9. The **Print Report** dialog will be displayed on your screen.

Print Report

Would you like to print the selected report?

Cancel
PDF
Print

10. Click OK to print the report or Cancel to return to your original screen without printing.

| Summary of Students |                    |                    |
|---------------------|--------------------|--------------------|
| Summary by Gender   |                    |                    |
|                     | Number of Students | Number of Bookings |
| Female              | 15                 | 95                 |
| Male                | 30                 | 166                |
| Total Reported      | 45                 | 261                |

**NB:** To include a list of student names, click Show Detail at Step 2.

Step 2: Choose/Update Report Summary Groups

Group 1 Summarize by Gender

Group 2

Group 3

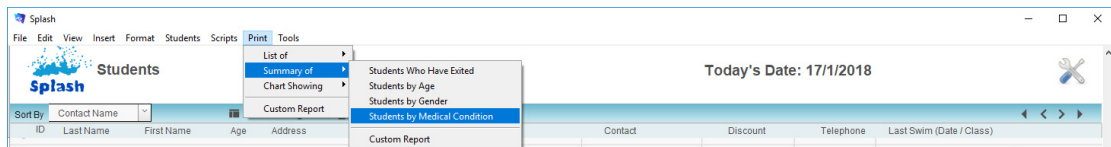
Show Detail ☒

| Summary of Students |  |                    |
|---------------------|--|--------------------|
| Summary by Gender   |  |                    |
|                     | Number of Students                               | Number of Bookings |
| Female              | 15   | 1                  |
| Bridgette Robinson  | 46 Hillcrest Road, Johnsonville, Wellington 4007 | 0272222082 1       |
| Caroline Thomson    | 25 Churton Drive, Churton Park, Wellington 4001  | 0272222082 8       |
| Georgia Taylor      | 79 Main St, Tawa, Wellington 4010                | 0272222082 20      |
| Jamie Anderson      | 876 Somewhere Rd, Tawa, Wellington 4010          | 0272222082 1       |
| Jane White          | 76 Moorefield Road, Johnsonville, Wellington     | 0272222082 8       |
| Jennifer Smith      | 89 Roberta Road, Tawa 4008                       | 0272222082 8       |
| Jessica Hargreaves  | 24 lane St, Wallaceville, Upper Hutt 5014        | 0272222082 1       |
| Jessica Sinclair    | 3 Main St, Tawa, Wellington 4010                 | 0272222082 8       |
| Joanne Jones        | 123 Any St, Wellington                           | 0272222082 12      |

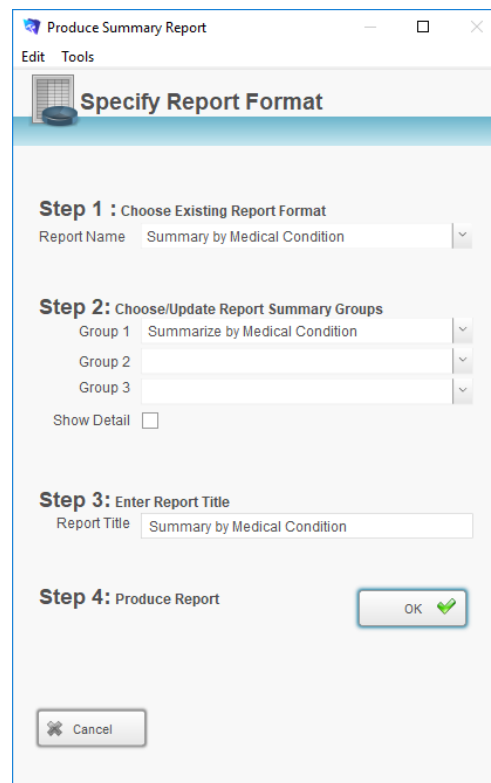
### Printing a Summary of Students by Medical Condition

This report displays a list of students by medical condition. The report will include a summary of all records in the found set.

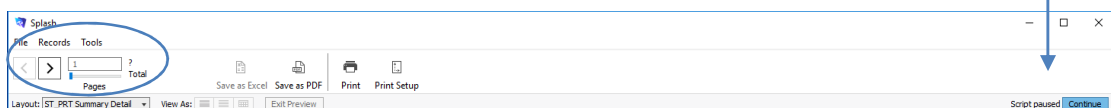
1. Use the **Finding a Student** function to locate the group of records you wish to include in your report. Place an asterisk (\*) in the medical condition field if you are looking for everyone with a medical condition.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of ...** from the Print menu and select **Students by Medical Condition** from the pop-out menu displayed.



4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.  
Step 1 = Summary by Medical Condition  
Step 2 = Group 1 set to Summarize by Medical Condition  
Step 3 = Report Name set to Summary by Medical Condition
6. Amend any of the above steps or include additional grouping options at Step 2.
7. Click the OK button.



8. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



9. The **Print Report** dialog will be displayed on your screen.

Print Report

Would you like to print the selected report?

Cancel
PDF
Print

10.Click OK to print the report or Cancel to return to your original screen without printing.

| Summary of Students          |                       |                       |
|------------------------------|-----------------------|-----------------------|
| Summary by Medical Condition |                       |                       |
|                              | Number<br>of Students | Number<br>of Bookings |
| ADHD                         | 1                     | 1                     |
| Asthma                       | 6                     | 47                    |
| disorder                     | 1                     | 1                     |
| Glasses                      | 1                     | 8                     |
| Impaired Hearing             | 1                     | 8                     |
| Wears Glasses                | 1                     | 8                     |
| Total Reported               | 11                    | 73                    |

**NB:** To include a list of student names, click Show Detail at Step 2.

Step 2: Choose/Update Report Summary Groups

Group 1 Summarize by Medical Condition

Group 2

Group 3

Show Detail ☒

| Summary of Students          |                      |   |                       |                       |
|------------------------------|----------------------|---|-----------------------|-----------------------|
| Summary by Medical Condition |                      |   | Number<br>of Students | Number<br>of Bookings |
| ADHD                         |                      |   | 1                     | 1                     |
|                              | Jamie Anderson       | 876 Somewhere Rd, Tawa, Wellington 4010 | 0272222082            | 1                     |
| Asthma                       |                      |   | 6                     | 20                    |
|                              | Georgia Taylor       | 79 Main St, Tawa, Wellington 4010       | 0272222082            | 20                    |
|                              | Jason Smith          | 89 Roberta Road, Tawa 4008              | 0272222082            | 1                     |
|                              | Jonathan Fairbrother | 56 Watt St, Tatahi Bay, Wellington 4012 | 0272222082            | 1                     |
|                              | Paul Fairbrother     | 56 Watt St, Tatahi Bay, Wellington 4012 | 0272222082            | 8                     |
|                              | Paula Schwass        | 123 Any St, Wellington 6440             | 0272222082            | 9                     |
|                              | william Smith        | 123 Any St, Wellington                  | 0272222082            | 8                     |

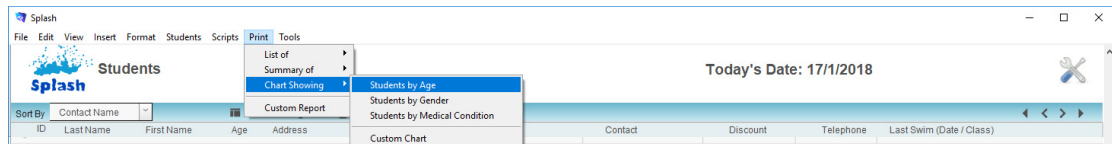


## Printing Student Charts

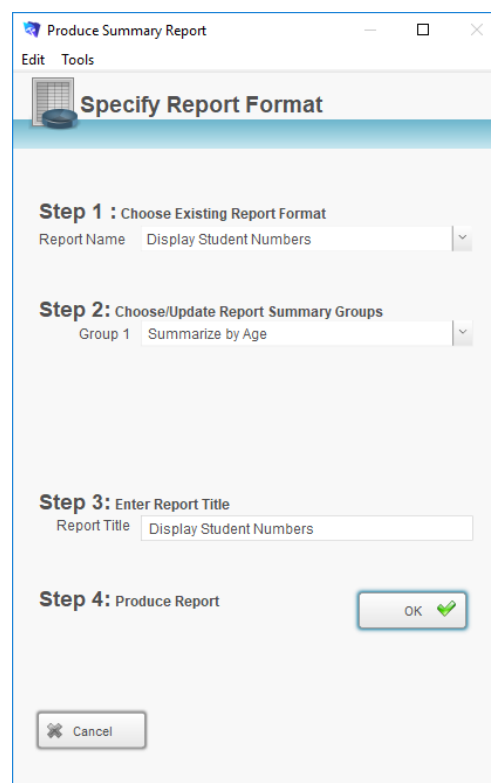
### Printing a Chart Showing Students by Age

This report displays a graphical representation of students by age. The report will include a summary of all records in the found set.

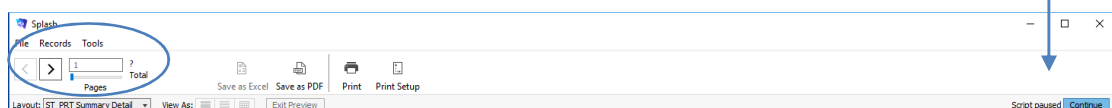
1. Use the **Finding a Student** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Students by Age** from the pop-out menu displayed.



4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.  
Step 1 = Display Student Numbers  
Step 2 = Group 1 set to Summarize by Age  
Step 3 = Report Name set to Display Student Numbers
6. Amend the grouping options at step 2 or change the report title.
7. Click the OK button.



8. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



9. The **Print Report** dialog will be displayed on your screen.

Print Report

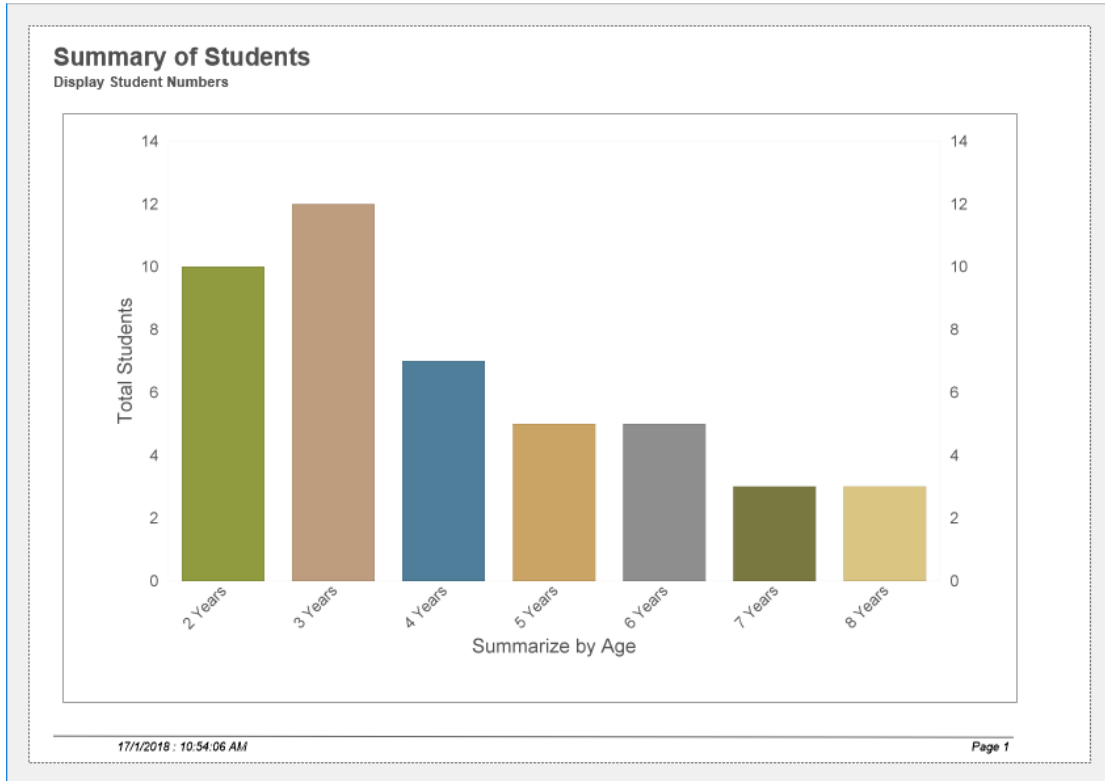
Would you like to print the selected report?

Cancel

PDF

Print

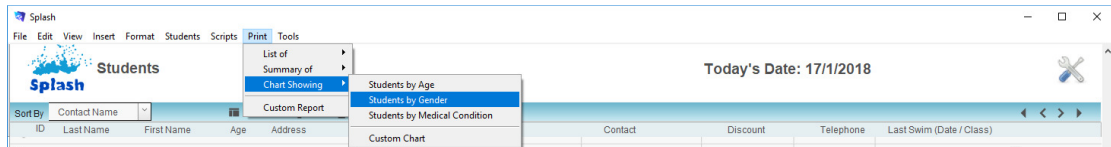
10. Click OK to print the report or Cancel to return to your original screen without printing.



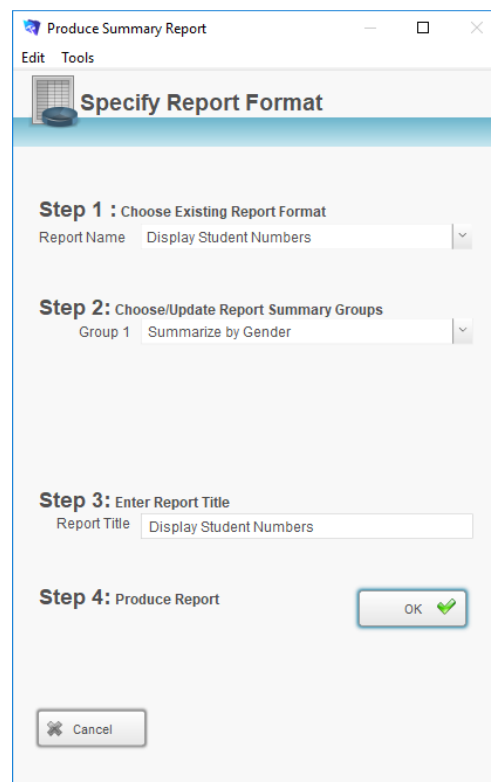
### Printing a Chart Showing Students by Gender

This report displays a graphical representation of students by gender. The report will include a summary of all records in the found set.

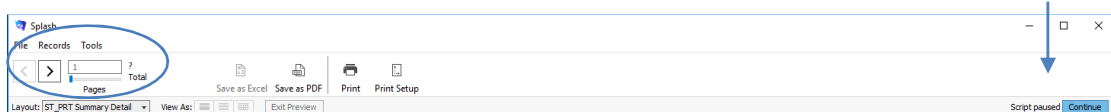
1. Use the **Finding a Student** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Students by Gender** from the pop-out menu displayed.



4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.  
Step 1 = Display Student Numbers  
Step 2 = Group 1 set to Summarize by Gender  
Step 3 = Report Name set to Display Student Numbers
6. Amend the grouping options at step 2 or change the report title.
7. Click the OK button.



8. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



9. The **Print Report** dialog will be displayed on your screen.

Print Report

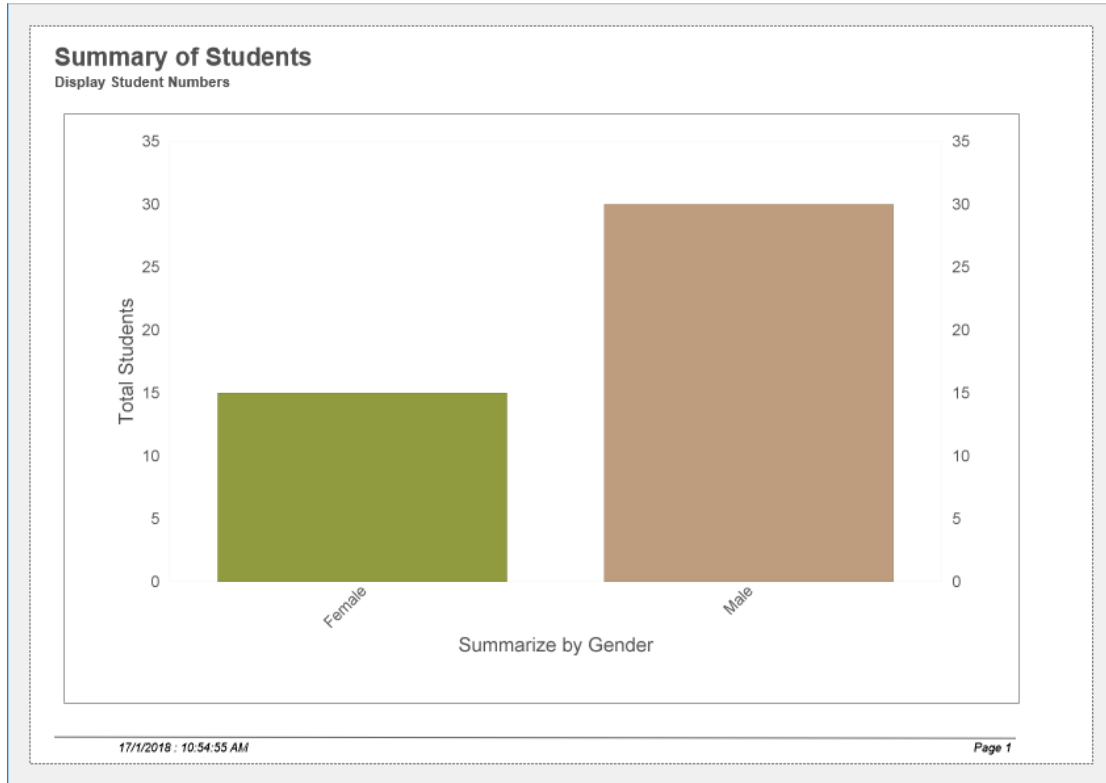
Would you like to print the selected report?

Cancel

PDF

Print

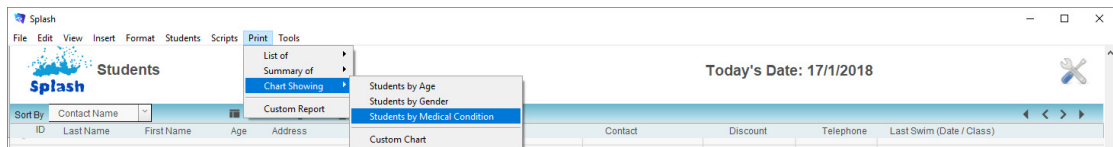
10. Click OK to print the report or Cancel to return to your original screen without printing.



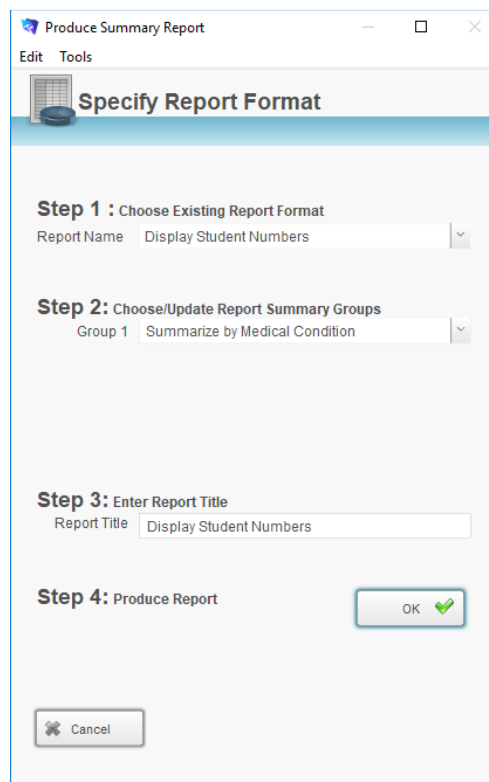
### Printing a Chart Showing Students by Medical Condition

This report displays a graphical representation of students by gender. The report will include a summary of all records in the found set.

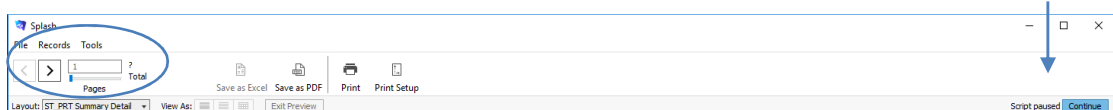
1. Use the **Finding a Student** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1). Please an asterisk (\*) in the medical condition field if you want to locate all students with a medical condition.
3. Select **Chart Showing ...** from the Print menu and select **Students by Gender** from the pop-out menu displayed.



4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.  
Step 1 = Display Student Numbers  
Step 2 = Group 1 set to Summarize by Gender  
Step 3 = Report Name set to Display Student Numbers
6. Amend the grouping options at step 2 or change the report title.
7. Click the OK button.



8. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



9. The **Print Report** dialog will be displayed on your screen.

Print Report

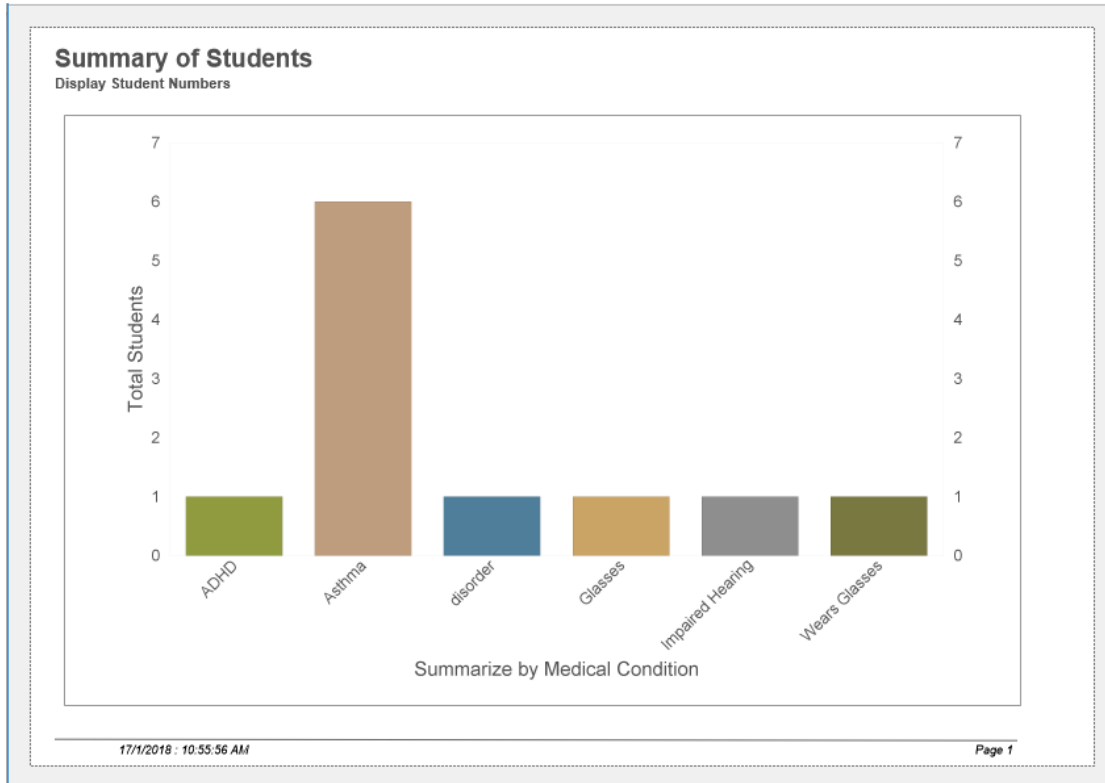
Would you like to print the selected report?

Cancel

PDF

Print

10. Click OK to print the report or Cancel to return to your original screen without printing.

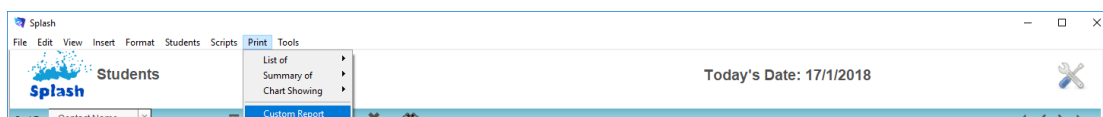


## Printing a Custom Report

In addition to the generic student reports, Splash provides custom report writing. Custom reports are specific reports layouts where you can change the grouping for summary totals.

### Displaying the Custom Report Dialog

1. Use the **Finding a Student** function to locate the group of students you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Custom Report ...** from the Print menu.



1. The report writer will be displayed on your screen.

A screenshot of the 'Produce Summary Report' dialog box. The dialog has a title bar with 'Produce Summary Report' and standard window controls. Below the title bar is a menu bar with 'Edit' and 'Tools'. The main area is titled 'Specify Report Format' and contains four steps:  
**Step 1: Choose Existing Report Format**  
Report Name: Summary by Gender and Age (dropdown menu)  
**Step 2: Choose/Update Report Summary Groups**  
Group 1: Summarize by Gender (dropdown menu)  
Group 2: Summarize by Age (dropdown menu)  
Group 3: (dropdown menu)  
Show Detail: ☐  
**Step 3: Enter Report Title**  
Report Title: Summary by Gender and Age (text field)  
**Step 4: Produce Report**  
OK button (with a green checkmark icon)  
Cancel button (with a red X icon)

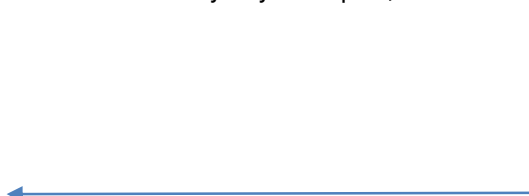
### Defining a Custom Report

The custom report dialog is divided into three steps. When you have completed each of the three sections you are ready to generate your report. Create your custom report by completing the steps outlined below:

2. Choose the Report Type
3. Choose the Reporting Groups.
4. Give your report a title.

The three fields displayed at **Step 2** are used to define how the information in your report will be structured. Summary totals will be displayed for each group you have defined at levels one, two and three.

If you wish to include detailed information about each family in your report, click the **Show Detail** button.



**Step 2: Choose/Update Report Summary Groups**

Group 1 Summarize by Gender

Group 2 Summarize by Age

Group 3

Show Detail ☒

### Custom Report Sample (No Detail)

The sample report below demonstrates the use of summary levels. Show Detail was left blank when the report was created.

| Summary of Students       |  |                    |                    |
|---------------------------|--|--------------------|--------------------|
| Summary by Gender and Age |  |                    |                    |
|                           |  | Number of Students | Number of Bookings |
| <b>Female</b>             |  | <b>15</b>          | <b>95</b>          |
| 2 Years                   |  | 5                  | 37                 |
| 3 Years                   |  | 5                  | 19                 |
| 4 Years                   |  | 1                  | 1                  |
| 5 Years                   |  | 3                  | 30                 |
| 7 Years                   |  | 1                  | 8                  |
| <b>Male</b>               |  | <b>30</b>          | <b>166</b>         |
| 2 Years                   |  | 5                  | 19                 |
| 3 Years                   |  | 7                  | 28                 |
| 4 Years                   |  | 6                  | 27                 |
| 5 Years                   |  | 2                  | 19                 |
| 6 Years                   |  | 5                  | 33                 |

### Custom Report Sample (Show Detail)

Information in the report below has been grouped by the same categories, however this time **Show Detail** has been selected.

| Summary of Students       |   |                    |                    |
|---------------------------|---|--------------------|--------------------|
| Summary by Gender and Age |   |                    |                    |
|                           |   | Number of Students | Number of Bookings |
| <b>Female</b>             |   | <b>15</b>          | <b>8</b>           |
| 2 Years                   |   | 5                  | 8                  |
| Caroline Thomson          | 25 Churton Drive, Churton Park, Wellington 4001 | 0272222082         | 8                  |
| Jennifer Smith            | 89 Roberta Road, Tawa 4008                      | 0272222082         | 8                  |
| Jessica Sinclair          | 3 Main St, Tawa, Wellington 4010                | 0272222082         | 8                  |
| Joanne Jones              | 123 Any St, Wellington                          | 0272222082         | 12                 |
| Melanie McArthur          | 39 River Road, Kelson, Wellington 4008          | 04 586 7894        | 1                  |
| 3 Years                   |   | 5                  | 1                  |
| Jamie Anderson            | 876 Somewhere Rd, Tawa, Wellington 4010         | 0272222082         | 1                  |
| Sally Anderson            | 876 Somewhere Rd, Tawa, Wellington 4010         | 0272222082         | 8                  |
| Sarah Nightingale         | 15 Albert St, Redwood, Wellington 4010          | 0272222082         | 8                  |
| Stephanie Hughson         | 98 Barrett St, Ngaio, Wellington 4007           | 0272222082         | 1                  |
| Tracey O'Donnell          | 87 Alfredton Rd, Kelburn, Wellington 4002       | 0272222082         | 1                  |