**INTRODUCTION**

* To be fully operational, SA-SAMS needs to be correctly set-up for the New Year. The checklist provided will guide the schools to check and update the fields for 2018/19.
* **Year-end promotion and roll over (3.19) need to be completed in 2018 to ensure functionality in 2019.**
* The 2019 Curriculum settings will be available in version 18.2.0.

**CONTENTS OF THIS TIP:**

To show the steps needed to export & import marks on an excel schedule:

1. A: Check list of steps to be completed on SA-SAMS for 2018
2. B: Subject Updates (Available on version 18.3.0
3. C: Lists and summaries for checking and verification & reports for Districts
4. D: Previous year’s marks available
5. E: Annexure –Promotion to be completed in 2018 for 2019 on 3.19
6. F: Annexure– offline capturing options if security setting is switched on

**A: Check list of steps to be completed on SA-SAMS in 2018**

This checklist is designed to guide the schools to ensure that all processes are done correctly.

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|  | **Screen** | **Function** | **Tick if checked** |
| **Learner promotion completed in 2018** | 12.7.18 | Confirm promotion decisions, identify progressed learners  Print statistical schedules (12.9.16) |  |
| 3.19 done once | Learners are promoted **in 2018** to the new Grades for 2019   * Follow the instructions in the Annexure as this process cannot be reversed. * This procedure is required to ensure that historical information is kept |
| **Learner updates** | 3.1.1 | Archive learners that are leaving   * Gr 7 is automatically archived |  |
| * Gr 12 is automatically archived according to SBA results. **Archive Gr 12 learners now that attained their NSC.** |  |
| 3.1.5 | Place learners in new register classes |  |
| 3.1.8 | Update LOLT of learners (Gr 4) |  |
| 12.1.15 | Assign subjects to the following learners   * learners entering a new phase * New learners   Check for errors on 12.1.18 | Available with 18.2.0 |
| 12.1.16 | Assign learners to different subject classes |
| 6.3 | Print pre-populated learner & Parent profile forms to confirm information ( Re-registration) |  |
| **New Learners** | 3.1.1 | Capture new learners with registration date as January 2018\*\* under “Future learners”   * Assign subjects to the learners |  |
| **Class lists** | 3.1.7 | Learners’ data per register class– design and print class-lists |  |
| **Educator updates** | 2.1 | Assigned register classes to educators |  |
| 2.1 | Update teaching load for all educators |  |
| 12.1.16 | Assigned Educator to different subject classes | On 18.0.0 |
| 16.12 | Assign Username and password for individual educators  Assign access to specific screens |  |
| 16.13 | Set-up access for all educators to and classes |  |
| 6.3 | Print pre-populated Staff profile forms to confirm information |  |
| **New Educators and Staff** | 2.1 & 2.3 | Capture new Educators and all non teaching staff |  |
| 2.1 | Educator contact list |  |
| **School Logo** | 1.15 | In case of a school logo with a large data size  Reduce the size of the school logo if a warning message appears on the size. |  |
|  | In case of no school logo  Personalize the school database by adding a school |  |

**B: Subject Updates (Available on version 18.2.0)**

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| --- | --- | --- | --- |
|  | **Screen** | **Function** | **Tick if checked** |
| **Setup and verify subject settings** | 12.3.11 | Validating the tasks and its raw totals and weights  by HOD and subject teacher |  |
| 12.3.15 -16 | Calendar of Tasks |  |
| **Access control to classes** | 16.13 | Access assigned to subject teachers per class |  |
| 16.13 | Access assigned to HOD and Principals |  |
| 16.13 | Change robot to green to activate the access control. |  |
| **Open tasks for capturing of marks** | 12.3.11 | For all subjects change the task status to “open” for capturing |  |
| 12.3.12.1 | Export subject lists for remote capturing |  |

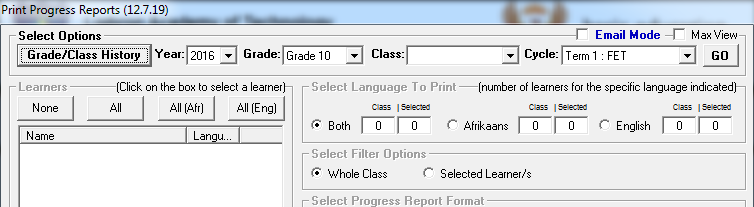
**C: Lists and summaries for checking and verification & reports for Districts during the year**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Screen** | **Function** | **Tick if checked** |
| **2018**  **Learner promotion** | 12.9.15 | Promotion schedules |  |
| 12.9.16 | Analysis schedules |
| **Learner data** | 3.1.7 | Summary report (SNAP & Head count)  (Class, learner numbers , educator and class room) |  |
| 3.1.6 | Learners’ data per register class– design and print class-lists |  |
| 12.1.16  12.3.12 | Teacher load and  Class lists per subject |  |
| 3.15  12.1.18 | Subject enrolments |  |
| 3.1.1 3.16 | Gr 12 Exam registration |  |
| **Staff data** | 2.9 and 2.19 | Educator data list |  |
| 2.3 , 2.19 | Staff data list (NSNP and other) |  |

**D: Previous year’s marks available**

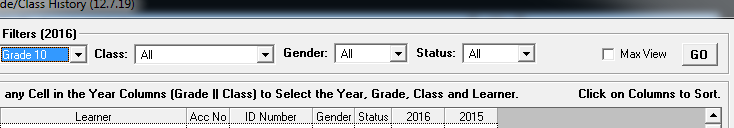
* **Learner reports**

Select “Grade/Class History” 🡪 screen 12.7.19



Select the grade that the learner will be in 2018.

Click on the required year.



* **Previous year’s schedules**
* On screen 12.3.12.16 previous year’s mark schedules can be selected and printed. Available if security setting is on (Annexure B)
* Previous year’s promotion schedules can be viewed and printed from 12.9.12 and 12.9.15.

New functions available if security setting is “ON”: