

Phoenix Gold

June Return 2004 - Creating your export file using Phoenix Gold

Before you begin the main instructions overleaf:

Dates of Admission must have been entered onto all your New Intake records in Phoenix

If you need to enter Dates of Admission for your New Intake, follow the instructions below:

- Open your **Phoenix Gold** database and log-in as usual
- Click **Pupil Groups**
- Click **New Intake Categories**
- Select the appropriate category
- Click Edit Categories
- Enter the **Date of Admission** you would like to be entered onto your New Intake records for each appropriate category
- When prompted to change the date of admission onto all pupils in this category, click **Yes** – please read the message carefully, as if you have entered a date prior to today's date by mistake, you will be asked if you wish to enrol all the pupils in this category into your Current Pupils!

CREATING YOUR EXPORT FILE WITH PHOENIX GOLD

1. Click on the **Pupil Reports** button from your **Phoenix Main Menu**.
2. Click on **Easy Adhoc/Export** from the sub-menu on the right-hand side of the screen.
3. If you have previously created a **June Return** proceed to **RUNNING THE REPORT TO CREATE YOUR EXPORT FILE (see below)**, otherwise, right click on an existing report and select **New Easy Adhoc/Export**.
4. You are presented with a list of fields from your database. Click on field names as listed below:

SURNAME & Forenames
Address – Line 1
Address – Line 2
Address – Line 3
Address – Line 4
Address – Line 5
Address – Postcode
Date of Admission
Date of Birth
Gender

5. When you have chosen the fields shown above, click **OK**.
6. In the box under **Name of report**, please type **June Return**.
7. Click **Save Report**

RUNNING THE REPORT TO CREATE YOUR EXPORT FILE

8. Click **June Return** report from your list of reports.

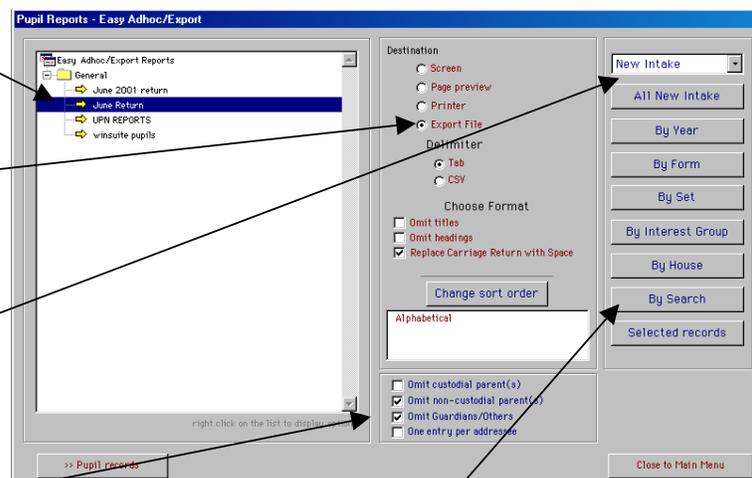
9. Click **Export File** for the destination.

10. Click the arrow to reveal the drop down list – select **New Intake**.

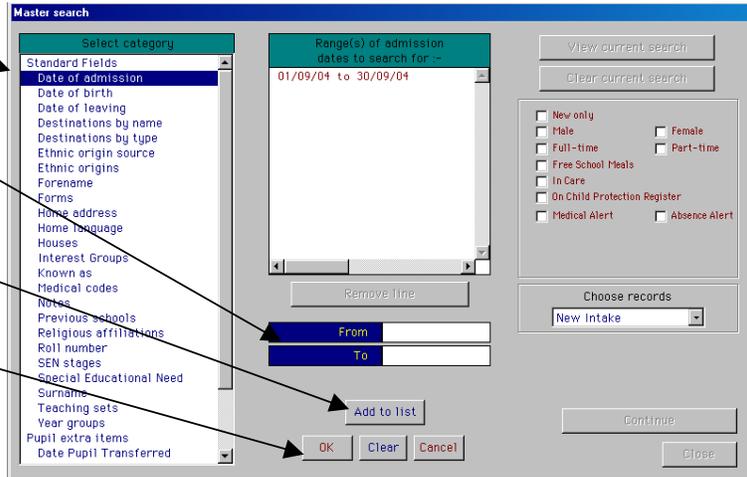
11. Click **Omit non-custodial parent(s)** and **Omit Guardians/Others**.

12. Click **By Search** from the choices on the right-hand side of the screen.

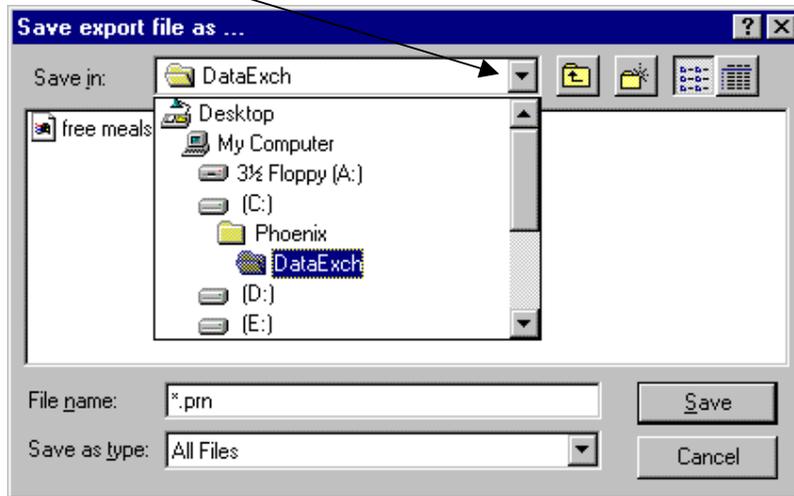
13. Click **OK** to use **Master Search**.



14. Select **Date of Admission** under **Select Category**
15. Enter 1/9/04 into **From** box, and **30/9/04** into **To** box.
16. Click **Add to List**
17. Click **OK**
18. Click **Continue**
19. A message appears telling you how many pupils match the criteria, click **OK**



20. Click on the arrow beside the **Save In** box to reveal the list of drives on your PC.

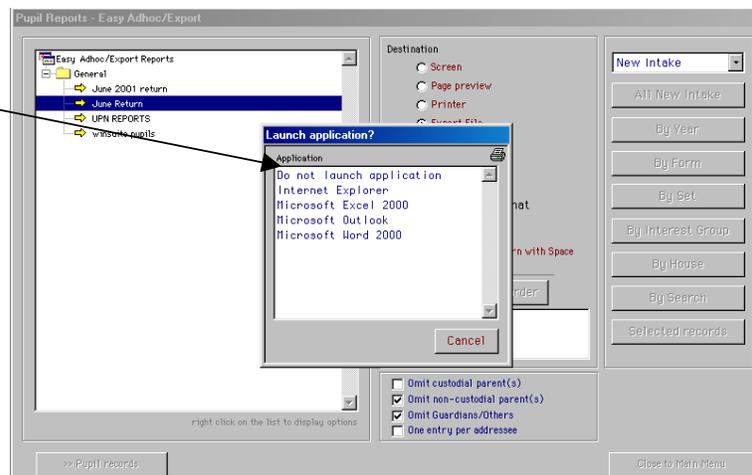


21. Name the file (overtyping the asterisk) with **xxxxjune.prn** (where **xxxx** is your school DfES number)

22. Ensure **DataExch** is showing in the **Save In** box at the top of the window; click **Save**

23. You will be prompted with the option to launch an application - click **Do not launch application**

24. You are returned to the Phoenix Gold screen.



SENDING YOUR FILE TO THE MANAGEMENT INFORMATION CENTRE

25. The file will be saved direct to your DataExch folder within your Phoenix folder. Find the export file within this folder (e.g. 1234june.prn) and drag the file into the AVCO Outbox on your desktop and send in the usual way.

Either:

- **Open your Anycomms PHOENIX** by clicking on the desktop icon.

or:

- **Open your Anycomms Client Software** by clicking on the desktop icon.
- Select "**Start Call**".

then:

- The data will be transferred to the MIC.
- You will get a Notepad window appear saying that it has been transferred, you may print this if you wish.
- Close the window.

Please contact Education ICT Solutions should you require assistance.

Telephone: 0845 303 3003
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web address: <http://ictsolutions.norfolk.gov.uk/>