



## PencilBox to SA-SAMS Export Instructions

### Create new addition fields required for SA-SAMS

Go into General->Maintenance->Control Codes and ensure that the boarding flag is on if you have a boarding facility, and off if you don't have boarding.

Enable Wait list	<input checked="" type="checkbox"/>
Boarding School	<input checked="" type="checkbox"/>
Lunch Default	<input type="checkbox"/>
Aftercare Default	<input checked="" type="checkbox"/>

Go into General->Maintenance->Additional Fields

Select Tables and then table details and press the Lurits button. You will end up with 7 or 8 new tables.

- These are
- LALE – SGB / SSC Level of education (Parent and staff)
- LASS – SGB / SSC Capacities. (Parent and Staff)
- LEAS – Additional Staff – Personal Categories. (Staff)
- LECU – Educator Computer Usage (Staff)
- LESL – ICT Skill Level (Staff)
- LEUN – Educator Unions (Staff)
- LLMT – Modes of transport. (Learner)
- LLHO – Hostel (Learner, only if boarding school)

If you are a boarding school, select the LLHO table->Table contents and fill in your boarding house names.

Select Learners and press the Lurits button. 13 or 14 new fields will be created as indicated above (LLMT:LLMT & possibly LLHO:LLHO, plus 4 sets of Social Grant Information). Enter the default values for these fields, save and press Fill Empty Vales.

Select Staff and press the Lurits button. 13 new fields will be created, (LEAS:LEAS, LECU:LECU, LESL:LESL, LEUN1:LEUN, LEUN2:LEUN 4 SGB fields, and 4 SSC fields). Fill in the default vales for LEAS = Not additional, and then select an appropriate value for LECU, LESL, LEUN1 and LEUN2. Select N/A for both SBG:LASS and SSC:LASS, save and fill.

Select Parent and press the Lurits button. 8 new fields will be created, (4 SGB fields, and 4 SSC fields). Select N/A for both SBG:LASS and SSC:LASS, save and fill.

**List of additional fields that can be exported if found.**

1. Learner

- a. LLDP:LLDP - Deceased parents
- b. LLMT:LLMT - Learner Mode of Transport
- c. LLHO:LLHO – Hostel for boarding schools only.
- d. RELIGION or REL – Religion
- e. SGI:CSup – Child support grant
  - i. SGI:CSupR – Registration
  - ii. SGI:CSupC – Receiving
  - iii. SGI:CSupN – Number
- f. SGI:Dis – Disability (18+) grant
  - i. SGI:DisR – Registration
  - ii. SGI:DisC – Receiving
  - iii. SGI:DisN – Number
- g. SGI:FCh – Foster child grant
  - i. SGI:FChR – Registration
  - ii. SGI:FChC – Receiving
  - iii. SGI:FChN – Number
- h. SGI:Dep – Care dependency grant
  - i. SGI:DepR – Registration
  - ii. SGI:DepC – Receiving
  - iii. SGI:DepN – Number

2. Parent

- a. SGB:LASS – SBG member
- b. SGB:LALE - SBG Level of Education
- c. SGB:DateE - SBG Date Elected
- d. SGB:DateR - SBG Date Resigned
- e. SSC:LASS – SSC member
- f. SSC:LALE - SSC Level of Education
- g. SSC:DateE – SSC Date Elected
- h. SSC:DateR - SSC Date Resigned

3. Staff

- a. LEYExp - Years Teaching Experience
- b. PERSAL or PERSALNO – Persal No
- c. SACE or SACENO – SACE membership number
- d. MARITAL – Marital status
- e. LEPL:LEPL - Post levels
- f. LEER:LEER – Remuneration
- g. LEHL:LANG - Home language
- h. LEPG:RACE – Population group
- i. LEPC1:LEPC - Actual Personnel categories
- j. LEPC2:LEPC - Acting Personnel categories
- k. LENA:LENA - Nature of appointment
- l. LEQC:LEQT - Qualification category
- m. LEQT:LEQL - Qualification type

- n. LEDA:LEDA - Duration of appointment
- o. LEDS:LEDS - Disability status
- p. LESL:LESL - ICT Skill Level
- q. LECU:LECU - Computer Usage
- r. LEUN1:LEUN – Union name
- s. LEUN1:No – Membership number
- t. LEUN2:LEUN – Union name 2
- u. LEUN2:No – Membership number 2
- v. SGB:LASS – SGB member
- w. SGB:LALE - SGB Level of Education
- x. SGB:DateE - SGB Date Elected
- y. SGB:DateR - SGB Date Resigned
- z. SSC:LASS – SSC member
- aa. SSC:LALE - SSC Level of Education
- bb. SSC:DateE – SSC Date Elected
- cc. SSC:DateR - SSC Date Resigned

**Setup defaults for new fields and fill.**

## Staff Attendance

Go to General->Maintenance->Attendance Reason Codes->Staff. Fill in all the maps to column from the drop down list and save. Example below.

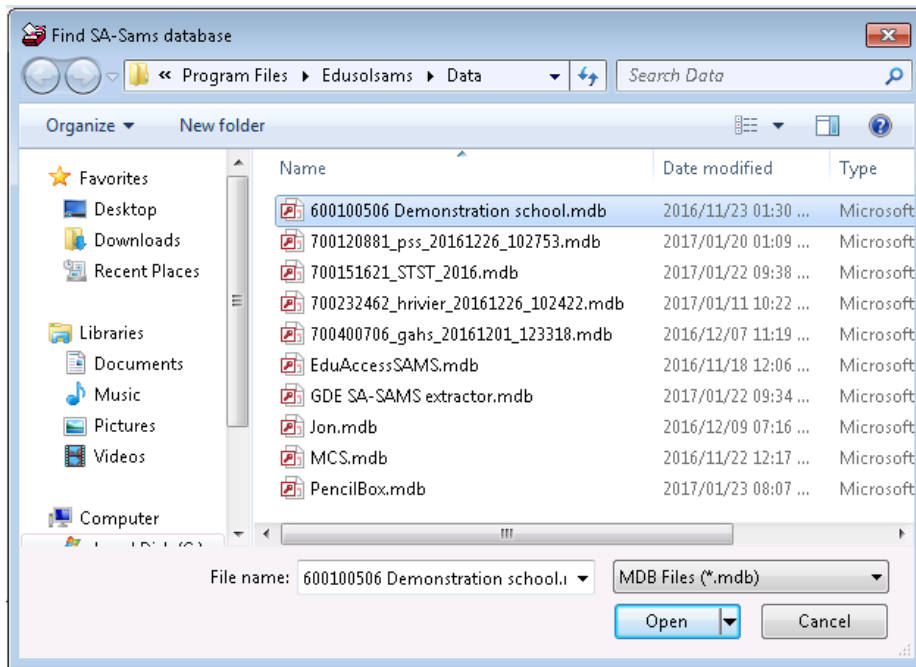
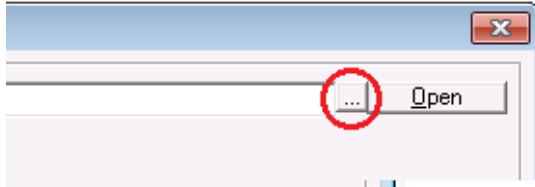
Staff attendance reason codes												
	Code	Description	Present	Absent	Late	SMS	SMSMessage	Email	EmailSubject	EmailMessage	Maps to	Portal
1	A	Absent	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>			Sick Leave	<input type="checkbox"/>
2	F	Family Responsibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>			Family Responsibility Leave	<input type="checkbox"/>
3	H	Holiday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>			Annual Leave	<input type="checkbox"/>
4	P	Present	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>			Unknown	<input type="checkbox"/>
5	S	Sick	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>			Sick Leave	<input type="checkbox"/>
6	SL	Study Leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>			Study Leave	<input type="checkbox"/>
New			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>			Unknown	<input type="checkbox"/>

Download the EXE onto the computer where SA-SAMS is installed. This can be found under downloads on [www.pencilbox.co.za](http://www.pencilbox.co.za). Save it to your desktop.

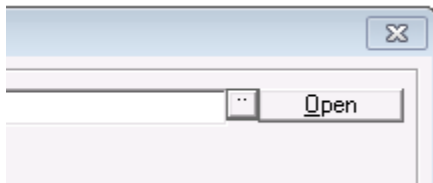
Run the exe

Press the browse button (top right) and Highlight the SA-SAMS database.

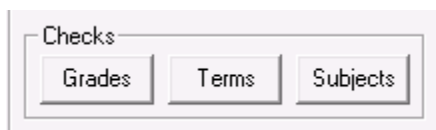
**NOTE: The Schools Database will start with the Schools EMIS Number**



Click on the OPEN button (top right)



DATA CHECKS: This is done to ensure your PencilBox data has the required flags to perform the export (bottom left).



1. Grades

Ensure that all the SAMS values in column 4 are correct. Missing or incorrect values can be filled in on this screen and corrections/updates will be saved to the PencilBox database.

**NOTE: these values are typically the grade + 2, example grade 8 has a value of 10**

The screenshot shows a window titled "Grades" with a table containing five rows of data. The columns are labeled "Cam", "Code", "Grade", and "SAMS". The "SAMS" column values are 10, 11, 12, 13, and 14. A red box highlights the "SAMS" column.

	Cam	Code	Grade	SAMS
1	DEM	G08	Graad/Grade 8	10
2	DEM	G09	Graad/Grade 9	11
3	DEM	G10	Graad 10	12
4	DEM	G11	Graad 11	13
5	DEM	G12	Graad 12	14

Exit

## 2 Terms

**NOTE: SA-SAMS runs on 4 Terms.**

On the Terms screen fill in the term numbers in column 5. Put a 1, 2, 3, 4 in the terms you want to export (1). Also check that the last year final cycles are correct (2). 1 Grade needs to be selected as the master grade for the term dates (3)

**Enter a – (minus sign) in the columns you want to EXCLUDE.**

Missing or incorrect values (Dates and SAMS column can be filled in on this screen and corrections/updates will be saved to the PencilBox database. The last year final cycles needs to be corrected in PencilBox.

**NOTE: Select the “Show only selected” tick box to check. Bottom Left of Screen**

	Cam	Grd	Code	Cycle	Start	End	SAMS	PY Final	Dates
4	STJ	1	R2	Report 2	2017/07/03	2017/12/06	2	2016 - T3 (0)	3
5	STJ	2	R1	Report 1	2017/01/18	2017/06/23	1	2016 - T3 (1)	
6	STJ	3	R1	Report 1	2017/01/18	2017/06/23	1	2016 - T3 (2)	
7	STJ	4	R1	Report 1	2017/01/18	2017/06/23	1	2016 - T3 (3)	
8	STJ	5	R1	Report 1	2017/01/18	2017/06/23	1	2016 - T3 (4)	
9	STJ	6	R1	Report 1	2017/01/18	2017/06/23	1	2016 - T3 (5)	
10	STJ	7	R1	Report 1	2017/01/18	2017/06/23	1	2016 - T3 (6)	
11	STM	I	T1	Term I	2017/01/18	2017/04/12	1	2016 - T3 (7)	<input checked="" type="checkbox"/>
12	STM	I	T2	Term II Exam	2017/05/03	2017/08/04	2	2016 - T3 (7)	<input checked="" type="checkbox"/>
13	STM	I	T3E	Term III Examinations	2017/09/06	2017/12/06	3	2016 - T3 (7)	<input checked="" type="checkbox"/>
14	STM	II	T1	Term I	2017/01/18	2017/04/12	1	2016 - PR (I)	
15	STM	III	T1	Term I	2017/01/18	2017/04/12	1	2016 - PR (II)	
16	STM	IV	T1	Term I	2017/01/18	2017/04/12	1	2016 - PR (III)	
17	STM	V	T1	Term I	2017/01/18	2017/04/12	1	2016 - PR (IV)	
18	STM	V	T3	Preliminary Examination	2017/09/06	2017/12/06	3	2016 - PR (IV)	

Show only selected Exit

### 3 Subjects

Select a Campus and Term to check.

The list will initially show **all subjects** that are selected to be exported (in Marks \ Maintenance \ Subjects Learning Areas) that **do not** have a LURITS code.

For subjects to be EXCLUDED turn off the export flag and save.

For subjects to be included in the Export, fill in the LURITS code.

To force a subject to be added to a learner in SA-Sams weather it exists in PencilBox or not, tick the force column.

The count button checks that all the learners have the 'correct' number of subjects.

**NOTE: There are some tools to help you fill in the LURITS codes. See next pages.**

Subjects Year : 2017

Subjects : 9

Campus: DEMO - PencilBox Demo School Grade: G08 - Grade 8 Term: Term 1 (1 grades)

	Grade	Subject	Description	Code	Export	Force	Learners
1	G08	A&CC	Arts & Culture	11351162	<input checked="" type="checkbox"/>	<input type="checkbox"/>	128
2	G08	AFR	Afrikaans 1st Additional Language	13314532	<input checked="" type="checkbox"/>	<input type="checkbox"/>	106
3	G08	EMS	Economic Management Sciences	12351102	<input checked="" type="checkbox"/>	<input type="checkbox"/>	128
4	G08	ENG	English	13304592	<input checked="" type="checkbox"/>	<input type="checkbox"/>	128
5	G08	HSSC	Human & Social Sciences	16351252	<input checked="" type="checkbox"/>	<input type="checkbox"/>	128
6	G08	LOC	Life Orientation	16341282	<input checked="" type="checkbox"/>	<input type="checkbox"/>	128
7	G08	MAT	Mathematics	19331442	<input checked="" type="checkbox"/>	<input type="checkbox"/>	128
8	G08	NS	Natural Sciences	19351412	<input checked="" type="checkbox"/>	<input type="checkbox"/>	128
9	G08	ZUL	IsiZulu	13314892	<input checked="" type="checkbox"/>	<input type="checkbox"/>	22

Show subjects with interface code  Show non SA-SAMS subjects  English  Afrikaans



Click on the **CHECK** button and the screen below will display. This shows the Subject Description and the one from SAMS to check. Any missing codes that can be matched by description are filled shown in **red** in the last column. There will be a **Fix** button (bottom right of screen). Click on **Fix** button and the click on Save. PencilBox Data will be updated with the interface codes filled in.

Subjects Year : 2016

Subjects : 78

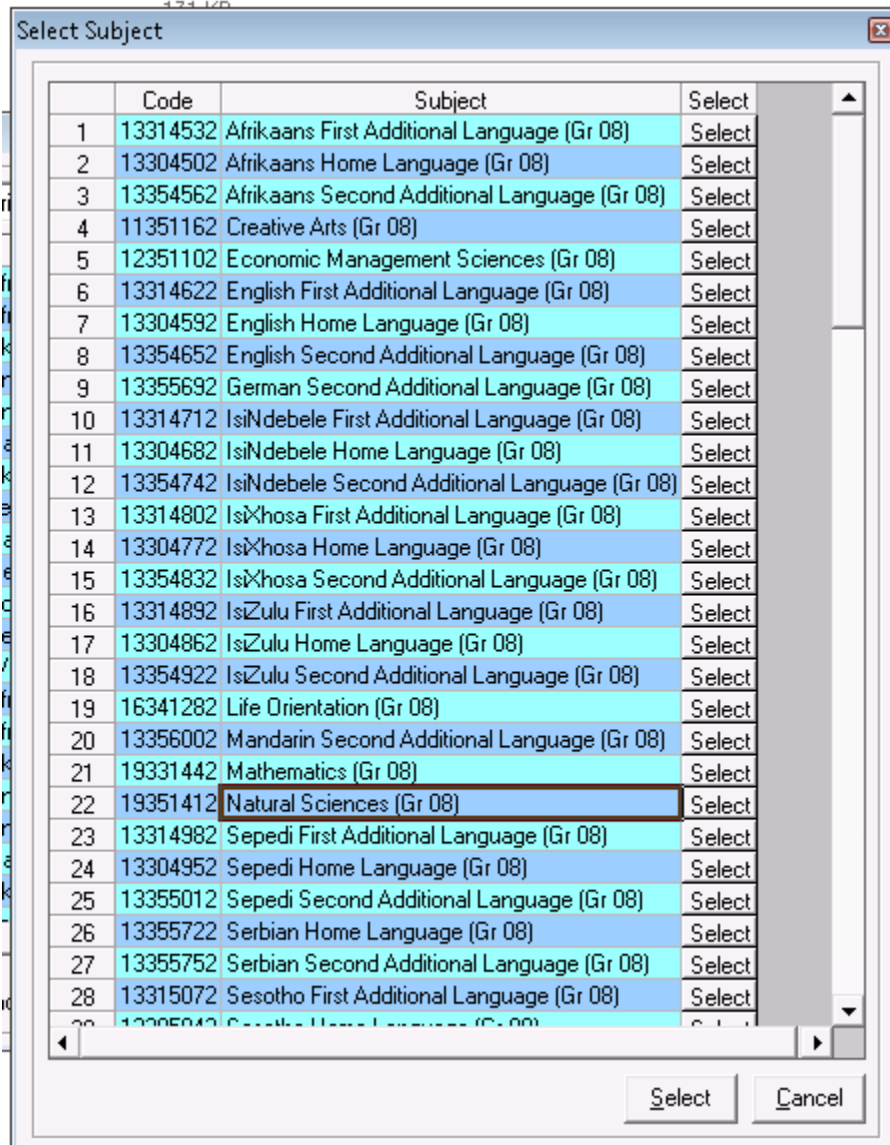
Campus : DEM - Demonstration School Term : Term 1 (5 grades)

	Grade	Subject	Description	Code	Export	Learners	Subject	Code
1	G08	AF1	Afrikaans Huistaal		<input checked="" type="checkbox"/>	81		13304502
2	G08	AF2	Afrikaans First Additional Language	13314532	<input checked="" type="checkbox"/>	149	Afrikaans Eerste Addisionele Taal	
3	G08	EBW	Ekonomiese- en Bestuurswetenskappe	12351102	<input checked="" type="checkbox"/>	230	Ekonomiese En Bestuurswetenskappe	
4	G08	EN1	Engels Huistaal	13304592	<input checked="" type="checkbox"/>	149	Engels Huistaal	
5	G08	EN2	Engels Eerste Addisionele Taal	13314622	<input checked="" type="checkbox"/>	81	Engels Eerste Addisionele Taal	
6	G08	GVS	Gasvryheidstudies		<input checked="" type="checkbox"/>	198		Not found
7	G08	KK	Skeppende Kunste	11351162	<input checked="" type="checkbox"/>	230	Kreatiewe Kunste	
8	G08	LD	Lewensorientering	16341282	<input checked="" type="checkbox"/>	230	Lewensorientering	
9	G08	NS	Natuurwetenskappe	19351412	<input checked="" type="checkbox"/>	230	Natuurwetenskappe	
10	G08	RTT	Rekenaartoepassingstechnologie		<input checked="" type="checkbox"/>	198		Not found
11	G08	SW	Sosiale Wetenskappe	16351252	<input checked="" type="checkbox"/>	230	Sosiale Wetenskappe	
12	G08	TEG	Tegnologie	15351132	<input checked="" type="checkbox"/>	230	Tegnologie	
13	G08	WGWWW	Wiskundige Wetenskappe	19331442	<input checked="" type="checkbox"/>	230	Wiskunde	
14	G09	AF1	Afrikaans Huistaal	13304512	<input checked="" type="checkbox"/>	85	Afrikaans Huistaal	
15	G09	AF2	Afrikaans First Additional Language	13314542	<input checked="" type="checkbox"/>	120	Afrikaans Eerste Addisionele Taal	
16	G09	EBW	Ekonomiese- en Bestuurswetenskappe	12351112	<input checked="" type="checkbox"/>	205	Ekonomiese En Bestuurswetenskappe	
17	G09	EN1	Engels Huistaal	13304602	<input checked="" type="checkbox"/>	120	Engels Huistaal	
18	G09	EN2	Engels Eerste Addisionele Taal	13314632	<input checked="" type="checkbox"/>	85	Engels Eerste Addisionele Taal	
19	G09	GVS	Gasvryheidstudies		<input checked="" type="checkbox"/>	192		Not found
20	G09	KK	Skeppende Kunste	11351172	<input checked="" type="checkbox"/>	205	Kreatiewe Kunste	
21	G09	LD	Lewensorientering	16341282	<input checked="" type="checkbox"/>	205	Lewensorientering	

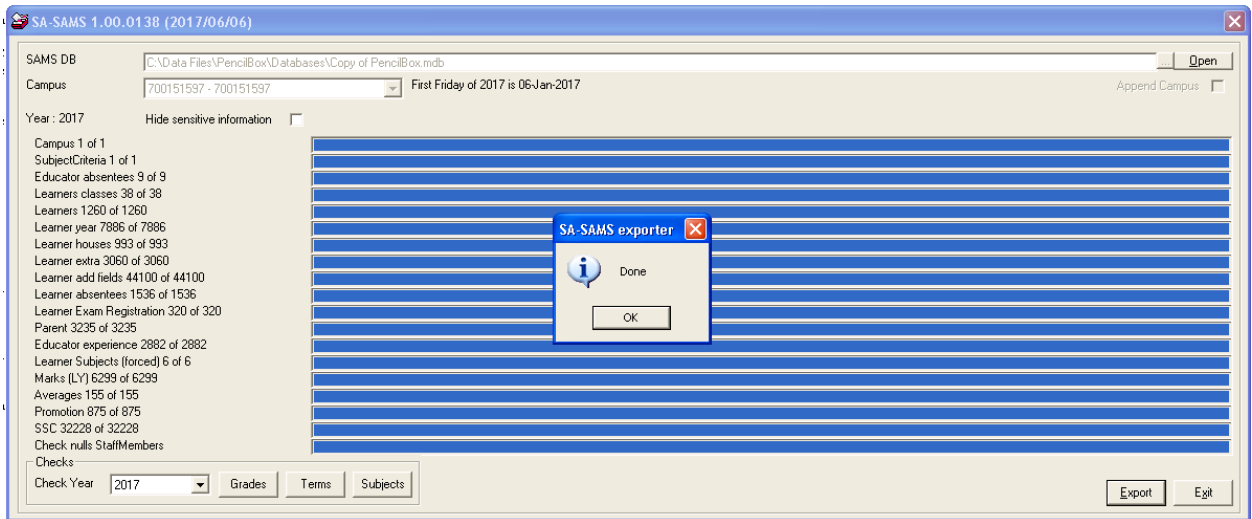
Show subjects with interface code  
 Show non SA-SAMS subjects  
 English  
 Afrikaans

If the code cannot be filled in automatically: **double click in the blank code**, this will display a list of codes. **Highlight** the relevant subject and then click on the **Select** button.

The code will then be updated. Click on Save to save the changes. PencilBox Data will be updated with the interface codes filled in.



Once all checks are complete: Select the Export Button (bottom right) and your SA-SAMS database will be populated.



**NOTE: THE HIDE SENSITIVE DATA WILL HIDE THE FOLLOWING DATA:**

**Parent: Surname, First Names, Initials, Title, All Telephone Numbers, Street and Postal Addresses as well as ID Numbers.**

**Staff: Surname, First Names, Initials, Title, All Telephone Numbers, Street and Postal Addresses as well as ID Numbers.**

End of Document: Good Luck