SECTION 2: SYSTEM MAINTENANCE

This section is presented in two parts – FILE MAINTENANCE, relating to various files within Trevlac that must be maintained for effective use of the program as a student record database; and PROGRAM MAINTENANCE, relating to various functions that may be required to ensure the effective performance of the overall program.

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SECTION 2.1 -- FILE MAINTENANCE

This section contains information on the following files within Trevlac:

- Course Files
- Grade Information File
- Home Room File
- Maintain User List
- School Calendar File
- Staff Information File
- Student Status File
COURSE FILES

A number of different course files – and student-related course screens - exist within Trevlac, each with its own purpose relating to scheduling, current-year courses, or long-term retention of a student’s accumulated course information.

The entries in most course files are associated with a specific Calendar ID.

The files that are used in your school, and how they are used, are related to the grade levels served.

Standard provincial course codes, and a standard process for the creation of course codes, are in place across PEI.

For information on course code structures, see Section 7: Courses and Marks.
GRADE DEFINITION FILE

The Grade Definition File contains the settings for all grades used in your school, plus one grade lower and one grade higher than those taught in your school.

A grade definition should never be removed from this file as long as there are records in your school’s database that show that particular entry in their Grade field. **IF YOU REMOVE A GRADE DEFINITION WHILE THERE ARE RECORDS SHOWING THAT GRADE, THE RECORDS WILL BE ERASED FROM YOUR DATABASE.**

Under normal circumstances, you will not be editing this file.

To view/edit the Grade Definition File:

- **Run** Trevlac and **log in**
- From the Trevlac menu **choose**: Areas / General / **Grade Definition File**

- **To add** a new grade definition: **click** on the **New** button; **type** in the grade **value**; **click** on the **green checkmark** – **Save**

- **To delete** a grade definition: **click** on/highlight the grade **entry** to be deleted – **click** on the **Delete** button – **Save**

- **To change the order** in which grades appear in the list: **click** on/highlight the grade **entry** to be moved – **click and hold** on the box with the **double arrow** beside the grade entry – **drag** to correct location (grades must appear in this file in the ascending order in which grades are to be incremented within the school) - **Save**

- **Click** on the **Close** button when all changes have been completed

You can click on the Count button to view a tally of all students, by grade and gender. The count applies to the status that appears in the field at the top of the window.

(For standard Grade entries, see the Appendix.)
HOME ROOM FILE

The home room file is where you have defined your home room designations. Some schools use the same home room designations each year. However, if there are new home rooms, or changes to the teachers assigned to existing home rooms, you will need to update the Home Room File at the beginning of the school year. (NEVER delete a home room - see below.) It is important to make any necessary additions to this file before trying to change students’ home rooms on the Student Master screen. Also, changes to the Staff Information file should be made before updating teacher information in the home room file.

NEVER DELETE HOME ROOMS FROM THIS FILE. DELETING A HOME ROOM WILL RESULT IN THE COMPLETE LOSS FROM THE PROGRAM OF ANY RECORDS OF STUDENTS ASSIGNED TO THAT HOME ROOM. This might not be immediately noticeable if these records are in something other than the Active status, but the records, once lost, are NOT recoverable.

General naming standards have been developed (January 2008) and should be used for grades K through 9, in most circumstances. Exceptions do exist, especially in intermediate schools, but should be verified with the Trevlac Consultant or your board office contact.

Naming Standards:
- Use 2-characters only
- Home room consists of a number (grade or highest grade of multi-grade) plus a letter (e.g. KA, 2B, 5C, etc.)
- Use only letters and numbers - no “/”, “-”, etc.
- Multi-grade classrooms* - use the number of the highest grade in the split, coupled with letters starting at end of alphabet, to create the home room - use letters Z, Y and X for two-grade classrooms (e.g. 2Z for 1/2 split, 2Y for second 1/2 split) and W, V, and U for three-grade classrooms (e.g. 3W for 1/2/3 split; 9W for 7/8/9 classroom).
- *Multi-grade classrooms where the same grade is in two different splits are handled a little differently to ensure the courses for each home room have a unique section code (for SAS) – e.g. for a 4/5 split and a 5/6 split, the 4/5 split would have a home room of 5Z and the 5/6 split would have a home room of 6Y.

To edit the information in an existing home room:
- Run Trevlac and log in
- From the Trevlac menu choose: Areas / General / Home Room
- Locate the home room on which the information is to be updated
- Click in the field(s) to be updated and enter/select the correct information (the most commonly-updated fields are the room or staff code; the Optional field can be used to indicate the grades included in the home room)
- Save when changes to that home room window are complete

To create a new home room:
- Run Trevlac and log in
- From the Trevlac menu choose: Areas / General / Home Room
- Click on the New button

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• Leave the generated **Number** or enter a unique number for this file
• **Enter** the **Home Room** according to defined standards
• **Enter** other **information** – room #, staff information, etc. – as desired
• **Save**

The Generate New Home Room utility (Utilities/General/Generate New Home Rooms) provides various options for updating home rooms for groups of students which may be useful to some schools. See *Trevlac Help Menu – Generate New Home Rooms Utility* for additional information.
MAINTAIN USER LIST

The User List is where user accounts are created for individuals who will have access to the school’s Trevlac program. Each user’s access to fields, screens, and functions is also established in this file. IT IS IMPORTANT THAT THIS FILE BE REVIEWED ON A REGULAR BASIS TO MAINTAIN APPROPRIATE ALLOCATION OF USER ACCOUNTS AND ACCESS LEVELS.

TYPES OF USERS

Superuser - "SUPERUSER" is the primary Trevlac user, and there are certain functions that can only be performed by someone logged in to Trevlac as Superuser. Generally only one user* in the school is designated as Superuser.

Only Superuser can:
- prevent other users from signing on
- create snapshots
- create new users and assign them rights and passwords
- run the Remove Orphans function

The Superuser account should only be used to log in to Trevlac when these functions are being performed. For other uses, the person who is the school’s "superuser" should log in using their own user account.

*Each school should maintain a record identifying the staff member designated as the school’s Superuser (see My School’s Trevlac System Information Sheet – at the end of this section). Where a need to provide additional users with Superuser access has been identified, that record should include the identity of that/those user/s.

Privileged User - A “Privileged User” has the same full program access as Superuser, but they cannot perform Superuser functions. Users who perform multiple data entry and operational functions within Trevlac are often given privileged user status – including the user login used by the primary Trevlac user ("Superuser") for day-to-day access.

Other Users - Additional users will be set up with the access they require – read (view) only, limited data entry, etc. – dictated by the type of work they are expected to do in or with Trevlac.

USER MAINTENANCE AND SECURITY

Yearly/Ongoing Maintenance – Updating User Accounts
At the beginning of each school year, the User List should be reviewed:

- Accounts for users no longer in the school – or no longer needing access to Trevlac – are to be removed.
- Accounts for users whose access requirements have changed (e.g., Resource Teacher may now be a classroom teacher) should be amended as needed.
- Accounts for new users should be created.

The same types of changes should be made during the school year if there are staff changes that affect user access.
**Security Measures – Protocols for Creating and Changing Passwords**

Trevlac provides a networkable student record system which is accessed by an increasing number of school staff. It is important that all users follow sound security practices when working with Trevlac to ensure the integrity and confidentiality of student information is maintained.

**Creating Secure Passwords**

There are computer "tools" in existence that can quickly and easily decipher many types of passwords. To ensure adequate protection of Trevlac data, it is important that all users make a concerted effort to create strong passwords for accessing the Trevlac program.

IT IS EXPECTED THAT ALL USERS WILL CREATE A STRONG TREVLAC PASSWORD THAT COMPLIES WITH THE FOLLOWING GUIDELINES:

- Include at least 8 characters;
- Include a mix of letters and numbers or other symbols and characters;
- Do not use personal information such as birthdates, names, number series, phone numbers, or your username.

Additional strategies to ensure a strong password:

- Don't use a password that you use for something else.
- Start with a phrase that you can remember – then change it. Suggestions for changes include: remove spaces; turn words into shorthand or intentionally misspell a word; add meaningful numbers at the end to add length; include letters in both upper and lower case; replace some letters with numbers or some other symbol.

For more information, or to access a tool to check your password strength – click [here](http://tinyurl.com/3qdmohy) or navigate to [http://tinyurl.com/3qdmohy](http://tinyurl.com/3qdmohy).

**Requirements for Changing Trevlac Passwords**

- EACH USER (INCLUDING SUPERUSER) IS EXPECTED TO CHANGE HIS/HER TREVLAC PASSWORD EVERY YEAR AT THE START OF THE SCHOOL YEAR.
- Passwords are to be kept confidential. They should NOT BE SHARED WITH ANYONE – verbally or in writing.

How to change your Trevlac password:

- **Run** Trevlac and **log in**
- From the Trevlac menu choose: **System / Change Password**
- **Enter** your **current** password – **click** on the **green checkmark**
- **Enter** your **new** password – **click** on the **green checkmark**
- **Enter** your **new** password again **(to confirm)** – **click** on the **green checkmark**
- Your password is now changed, and you will be back on the main Trevlac screen.

*Superuser can access every user’s account and change their password through the Maintain User List area.*

**Other Security Measures**

Other measures should be in place on computers, both in the administration office and at other locations, where sensitive information can be accessed. It is very
important that computers that have access to Trevlac are not left unattended
without the user logging out of Trevlac. Also, computers used for Trevlac or having
access to any type of sensitive or confidential files should have a screen saver in
place. Where possible, the screen saver should be protected by a screen saver
password. Please note, however, that a screen saver password is often attached to
the specific workstation so (1) it is not appropriate for workstations used by
students, and (2) all staff expected to be using a workstation which is password-
protected must be made aware of the password.

**CREATING NEW USERS AND EDITING USER ACCESS**
Several user account “templates” have been created in most schools, and these can
be used to easily create accounts for new users. These include:

- **Teachers** - with read-only access to student information screens - no access to
  Special Education screen (some schools may give teachers limited "write" access
to certain screens or fields – a decision made by the principal)
- **Resource Teachers** – with read and write access to Special Education screen,
  and access to reports and queries; read access to other student information
  screens
- **Administrators and office staff** (not primary user) - school choice - may have
  Privileged User access, or limited
- **Primary Trevlac User** – this user will generally be the Superuser plus have
  their own Privileged User account
- **Temporary Trevlac User** - this user is someone who is filling in temporarily for
  a staff member but might need to look up information on Trevlac; access is
  limited to read-only rights

**To Create a New User Account**
- **Run** Trevlac and **log in**
  - From the Trevlac menu **choose**: System / **Maintain User List**
  - In the User box (first field), use the dropdown arrow to **locate and click on** the
    template or name of a user with the same access as the new account you wish
    to create
  - With the entry in the User box highlighted – DO NOT DELETE THIS!!! – **type** the
    name of the new user “over the top of” the highlighted text
  - **Type a password** for the new user in the Password box
  - Use the dropdown arrow next to Staff Name to **select** the corresponding entry
    from the Staff Information file
  - With that template/user now in the User field, click on the **Save** button

**To Edit User Access**
- **Run** Trevlac and **log in**
  - From the Trevlac menu **choose**: System / **Maintain User List**
  - In the User box (first field), use the dropdown arrow to **locate and click on** the
    name of a user you wish to edit access for
  - Click on the User Access button (with a “key” on it) to enter the User Access
    window - add, remove, or edit access to individual fields, screens, or functions,
    as desired
  - When those edits are complete, click on the Save button, then on the Close
    button, to complete the changes for that user and return to the Maintain User
    List Window

Updated March 2012
• A few functions are enabled/disabled at the bottom of the Maintain User List window – review and edit those, as desired
• Click on the Save button to save any unsaved changes
SCHOOL CALENDAR FILE

The creation of a new School Calendar file (Calendar ID) is the first step in preparing for the scheduling process. A calendar file is also required for various course and attendance-related functions.

Naming standards for the Calendar ID and Description have been established. Standards for coding Special Days (holidays, PD days, storm days, etc.) also exist – these must be defined in the Absence Code File before they can be used as “special days” in the creation and maintenance of the School Calendar. Each non-teaching day is defined within the Calendar Setup area by its date and code.

Naming Protocols
Naming the Calendar ID each year should follow the following protocol, where x is the last digit in the first year of the school year that the calendar applies to (e.g. 2011/12 – x=1):
- xE - grades K to 6 and elementary/intermediate requiring only one calendar (e.g. 1E)
- xI - grade 7-9 schools, elementary/intermediate requiring additional calendar for intermediate grades, and intermediate/senior highs if requiring additional calendar for intermediate grades (e.g. II)
- xH - grades 10-12 (e.g. 1H)

The entry in the Description box should provide a complete description, not just the dates – e.g. 2011/12 School Year, or 2011-2012 School Year. This entry will appear on some printed reports.

Commonly-used “Special Days” used in the calendar include:
S- Storm
P - Professional Development Day
I - In-School Workshop, including local pilot PD
H - Holiday

Creating a Calendar for the New School Year
Creation on the new calendar is based on the previous year’s calendar.

- Run Trevlac and log in
- Go to: Areas / General / School Calendar
- Go to the current year’s calendar
- Click on the "New with Value" button on the toolbar (this creates a copy of the existing calendar), and edit this copy as necessary
- Most values will remain the same, with the exception of the following which should be edited (in the order given below):
  - Calendar ID and description (as indicated above)
  - End Date (June 30 or last SCHOOL day of the new school year, as defined by the provincial calendar)
  - Answer "No" to the popup window about 365 days that appears when you go to Start Date
  - Start Date (September 1 or first SCHOOL day of the new school year, as defined by the provincial calendar)
  - School Year (will probably update automatically)
When the semester tab pops up, make any changes needed.

- **SAVE**
- Answer "yes" to "keep the existing day types.
The Special Days list can be updated now, if the information is available; or this can be done at a later date. *(See below for procedure)*

**Updating the Calendar**
(To add non-teaching days, as well as adjust for storm days or other closures during the school year etc.)

- **Go to:** Areas / General / School Calendar
- Go to the Calendar ID to be adjusted
- **Click** on the "List View" tab
- **Click** on the "Setup Calendar" button (1st of three buttons - upper right)
- **Click** on the "Special Days" tab
- **Click** on the Add (+) button
- On the right side of the screen next to the Date label, enter the date for which adjustment is being made (use the Browse button to select from a calendar, if desired)
- At the Range End Date label, enter the end date (for one day, enter the same date as entered in the Date field; if multiple days, enter the final date in the group)
- In the Special Day (AM) field, choose the appropriate code from the drop down list (these codes are set up in the Absence Code file – see ............)
- In the Special Day (PM) field, choose the appropriate code from the drop down list
- Skip over day/cycle – click in the box to add/remove checkmark – In most instances, there should be checkmark in this box. The exception is when adjusting the calendar for a closure that was not district wide (e.g. a single school or family of schools closure).
- **Click** on the green checkmark to **Save** the changes.
- Answer "Yes" to question "Keep existing day types when possible?"

**Creating Codes for Special Days**
Codes for Special Days are set up within the Absence Codes file. Most of the codes that are needed/used have already been created. The following procedure can be used if a new code needs to be set up.

- **Go to:** Areas / Attendance / Absence Codes
- **Click** on the green checkmark to enter the Absence Codes file.
- In the Entry tab, **click** the New button on the toolbar
- **Enter** the new code in the Absence Code box.
- **Enter** Reason (short description of purpose of code)
- **Add/remove checkmarks** from the appropriate boxes, depending on the type of code (for Special Days – storm and other closures, holidays, PD, etc. – no checkmarks are needed)
- **Click** on the Save button to save.
  (Can be repeated for additional codes)

**Retention/Re-naming**
In March 2010, a process for re-naming older calendars was put in place to allow for the allocation of previously-used calendar IDs during the 2011-2020 decade.

Updated March 2012
That re-naming process involves using the letters of the alphabet in reverse order. Schools were supported in the process of re-naming calendars prior to the 2009/10 calendar. There should be no need to repeat this process until the year 2020.

**NOTE: The current year calendar should NEVER be re-named.** (See Appendix for a table of the re-naming done in 2010; and notes on the re-naming process.)
STAFF INFORMATION FILE

The Staff Information file should contain a record for each instructional staff member, especially each staff member associated with a course. A record may be set up for other staff members, as well.

The Home Room, Current Courses, and Master Schedule files all validate to the Staff Information File; as does the Maintain User List file. A completed staff information file is also needed to interface with software such as StudentsAchieve.

Naming Standards – Each school is expected to establish a coding and data entry standard for this file, and maintain that standard within the school. One common method is to use the first two letters of the last name (ignore the “c” or “ac” in Mc,Mac) + first letter of first name (e.g. Robert Ghiz- CHR, Gerard MacDonald - MDG).
- At a minimum, the Staff Code; Staff name (preferably in last name, first name format; Last Name; Given Name; and Job Type fields should be completed.
- Limit Staff Code to 3 characters (preferred for non-Rotary users, required for Rotary users)
- Staff Code must be unique to each staff member. StudentsAchieve users - preferable not to re-use a staff code, even if it has been deleted
- Rotary Timetable users - staff codes in Trevlac must match those used in Rotary; if they do not match, courses for those teachers will not be imported when the import utility is run

If a team of teachers is responsible for one homeroom, create a record for the team that accounts for both staff members. For example: to print J. Macdonald/S. Smith on the report card, you would create Staff Information record with the following values:
- Staff Code = TEAM1
- Staff Name = J. Macdonald/S. Smith
- Given Name = J (no period required)
- Last Name = MacDonald/S. Smith (when printed, this will be trimmed to 25 characters)
If there is more than one team, increment the Staff Code for the next team to TEAM2, and so on.

JOB TYPES
Valid Job Types (entered in the Job Type field on the Professional tab) have been defined as follows (2011):
- T = Teacher (or Teacher TEAM) with at least 1 teachable course within the current Calendar
- X = Any staff member (instructional or support) with no teachable courses
- Z= Inactive teacher

The Job Type field should be reviewed yearly to ensure it is still accurate for all records.

System Parameters Setting: In System/ Define System Parameters / General tab – page 2 – The box next to "When assigning staff to courses include staff with Job Type of"should show T.
How to add a new record:
- Run Trevlac and log in
- From the Trevlac menu choose: Areas / General / Staff Information
- Click on the green checkmark to enter the Staff Information area – or run a query from the Saved Queries list
- Click on the New button
- Enter the appropriate Staff Code and Staff Name, according to your school’s established standards – and any other information you have chosen to maintain within the record
- Enter the Given Name and Last Name
- Enter the Job Type (Professional tab)

How to edit/update an existing record:
IMPORTANT: DO NOT delete or edit the Staff Code or Staff Name for any staff information record without first consulting with your board-based or ITSS StudentsAchieve contact
- Run Trevlac and log in
- From the Trevlac menu choose: Areas / General / Staff Information
- Click on the green checkmark to enter the Staff Information area – or run a query from the Saved Queries list
- Locate the record to be edited and make the desired changes (see warning above)
- Job Type should be updated when appropriate
- Click on the Save button

How to deactivate a record:
DO NOT DELETE RECORDS FROM THE STAFF INFORMATION FILE.
- Run Trevlac and log in
- From the Trevlac menu choose: Areas / General / Staff Information
- Click on the green checkmark to enter the Staff Information area – or run a query from the Saved Queries list
- Locate the record to be deactivated
- Change Job Type to Z
- Click on the Save button
STUDENT STATUS FILE

Every student record must show a “status” on the student master screen. For a status to be available for use, it must first have been set up in the Student Status file.

Each status in the Student Status file must include a “type” - usually E (for Entry) or W (for Withdrawal). This entry will have some impact if this screen is used for reporting purposes.

When a student comes to or leaves a school, their status would normally be changed. Other status changes, such as Alternate to Archived, are more administrative in nature.

The standard statuses approved for use across PEI are as follows:

**Active** - used for all students currently attending your school

**Alternate** - used for all students who exit your school during the current school year

**Altreturn** – *(new in 2007/08)* – used for students, usually at the senior high level for scheduling purposes, who have been changed to Alternate for the current school year; but have indicated they will be returning to the school the following semester/school year

**Archived** - used for all students who have left your school prior to the current school year

**NewReg** - used for student records being added to a database prior to when they will be attending, including students previously changed to Archived - i.e. feeder school transfers, new registrations for coming school year (such as kindergarten), or senior high students registered for 2nd semester only

**Other** - can be used as an alternative to deleting - a “catch all” status for records that were never part of the database and would be deleted

Schools may also create school-based status definitions for in-school functions. Any record of such status changes should usually be removed from the Entry/Withdrawal screen prior to sending data to the board office.

Status records are created in the Student Status area *(Areas / General / Student Status)*. Users will not generally edit this file after its initial setup. For additional information, see the *Trevlac Help menu – Student Status File*. 

Updated March 2012
SECTION 2.2 – PROGRAM MAINTENANCE

This section contains information on the following topics:

Backups
Data Retention Guidelines
Define System Parameters
Patches and Updates
Pop-Up Validations
Regular Program Maintenance
Trevlac Support
Tricks & Troubleshooting
  Keyboard Navigation
  General Notes
  Toolbars
  Program Help
  ODBC Settings
  Printing – Crystal Report Errors
  Special Education Screen/Reports
  WinZip
  Maintain Error Log
User Labels / Enter Descriptors
Users Logged In
Your School’s Trevlac System Information Sheet
A system should be set up to back up your school’s Trevlac data on a regular basis. Schools making daily changes to student records should perform daily backups; other schools should perform a backup at least weekly - more often when data is being updated, such as in September, or when new kindergarten records are being created.

The "backup" discussed here is really a copy of the Trevlac program – or, at least, the folder that contains the student record data. This is in addition to the backup created as part of the school’s network backup. It is recommended that you maintain a log of backups, so you can easily determine when, where, and under what circumstances backups were created – in the event that it is necessary to restore your data.

Based on your board’s recommended procedures, these copies should be made either to the hard drive (of your primary Trevlac user), or the network server. In either case, a set of daily backup folders should exist on the designated drive, as follows:

(drive):/TREVLAC_FILES/BACKUPS/1MONDAY
(drive):/TREVLAC_FILES/BACKUPS/2TUESDAY
(drive):/TREVLAC_FILES/BACKUPS/3WEDNESDAY
(drive):/TREVLAC_FILES/BACKUPS/4THURSDAY
(drive):/TREVLAC_FILES/BACKUPS/5FRIDAY

(Note: There is a different folder used for the backup created to run a program update.)

Where daily backups are made, the practice is often to copy only the Trevlac7/Data folder on Monday through Thursday, and the complete Trevlac7 folder as a weekly backup. Users performing only weekly backups should copy the complete Trevlac7 folder.

Backups are also created under special circumstances, including before a program patch or update; prior to running some irreversible procedures such as the increment grade utility, a “tricky” universal update, or scheduling; or at yearend or the time of sending a snapshot to the board office.

Backups can easily be created in My Computer by copying and pasting the folder from the source location to the backup location.

The Backup/Restore process available within Trevlac under the System menu is NOT recommended.

**How to make a backup:**
- **Run** Trevlac, **log in** as Superuser
- From the Trevlac menu **choose**: System / Users Logged In – put checkmark in “Prevent users from signing on” box, and make sure no users, other than yourself, are logged in
- Ensure no users are logged in to Trevlac, or have the Trevlac login screen open

Updated March 2012
• (recommended) **Run** Remove Deleted Records and Remove Orphans (under System menu)
• **Close** Trevlac
• **Open** My Computer and create backup by making a copy of the Trevlac7 folder

Sample process:
• assume Trevlac is running from your server at: O:\TREVLAC7
• assume backups folders have been created on your hard drive (C:)
• go to My Computer - highlight the O: drive - double click on the TREVLAC7 folder
• on Monday through Thursday – double click on the O: drive – double click on the TREVLAC7 folder - click once on the DATA folder - then on the menu bar go to Edit / Copy (or Ctrl+C) — Then: go to the C: drive, find and double click on the appropriate day’s subfolder - then on the menu bar go to Edit / Paste (or Ctrl+V) to copy the DATA folder to the backup location – if prompted, answer “yes to all” at each pop-up window to replace existing files
• on Friday – double click on the O: drive – click once on the TREVLAC7 folder - then on the menu bar go to Edit / Copy (or Ctrl+C) — Then: go to the C: drive, double click on the 5FRIDAY subfolder - then on the menu bar go to Edit / Paste (or Ctrl+V) to copy the TREVLAC7 folder to the backup location – if prompted, answer “yes to all” at each pop-up window to replace existing files

**NOTE:** To create a full backup during the week, follow the process for Friday, but copy the Trevlac7 folder to the other “day of the week” subfolder

**Sample Backup Log**

<table>
<thead>
<tr>
<th>Date</th>
<th>Full or DATA</th>
<th>Copied to folder</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**DATA RETENTION GUIDELINES**

**Student Records**
Student records should be kept in the Trevlac database indefinitely. Records of exited students are kept, long term, in Archived status.

**School Calendars**
School calendars must be kept for at least five (5) years. Beyond that time, after ensuring the necessary associated records (attendance, course information, etc.) are available in some other format, older calendars can be deleted. A re-naming process (see Appendix) has been created to streamline the process of keeping calendars for a longer time period.
DEFINE SYSTEM PARAMETERS

Within Trevlac, a number of standard System Parameters would have been set up when Trevlac was installed at your school. Most of these settings will remain unchanged. Exceptions include the principal’s name, which must be updated as necessary. Also, on occasion, you may receive board or provincial direction to alter one or more standard settings in this area.

The Define System Parameters area is set up with a number of tabs. Settings on one of these windows may be required to enable or disable functions related to other areas of the program.

To access system parameters:
- Run Trevlac and log in
- From the Trevlac menu choose: System / Define System Parameters

The tabs in this area include: General, Mark/Credit, Family/Attendance, Spelling, Fee Management, Teacher Program, Audit, and Remote. Some of these may not be accessible to you. Standards for various settings on several of these windows are outlined here.

General tab -

Page 1:
- Default Query Status - Active
- Student Number Prefix Length - 3
- Student Number Prefix - {your three-digit school code}
- Insert Dash After Prefix - ✔
- Student Number Sequence Length - 4 (can be increased in the future if it becomes necessary)
- Display Advisor as Tool Tip Text instead of PM Home Room - ✔

Page 2:
- Manual entry of student number - ✔
- When assigning staff to courses include staff with Job Type of - T
- Recommended settings:
  - Show descriptions with popup - ✔

Mark/Credit tab -
- Do not include blank marks - ✔
- Include failures when calculating mark totals - ✔
- Show semester/day/block when updating - ✔
- Number of mark columns on Current Courses & Marks screen - 8
- Characters of course code to compare for credit totals - 8
- When transferring courses from the Current Courses & Marks screen to the Accumulated Credits screen should . . . Failures to be transferred - ✔
  - Credit totals by Credit Value - ✔

Family/Attendance tab –
Family Options:
- Student Master UD field to Store Student Number - None
- Student Master UD field to Store Youngest/Eldest Indication - ✔
- Select Common Family Information – leave right side blank
  (these settings will be changed when preparing to run the Mark Students in
  Family utility, but must be changed back when the utility run has been completed;
  to avoid unexpected problems)

**Spelling Options** tab -
  Recommended settings:
  - ignore words in UPPERCASE (means program will see upper and lower case as the
    same) - ✔
    - ignore words with numbers - ✔
    - ignore Internet Addresses - ✔
PATCHES AND UPDATES

Trevlac Computer Services updates their School Administrator program on a regular basis – to improve it, to address ideas and requests from clients across Canada, and to update support files. Approximately once a year, the company issues a program “update.” Between updates, they periodically issue “patches” designed to incorporate one or more fixes or changes to specific items.

The most recent update or patch installed determines the “build date” that will appear on your main Trevlac screen. When an update is installed, the build date changes to reflect its issue date. When a patch is installed, it generally appends a notation to the build date.

When information about a new update or patch is received, testing is completed; and a provincial decision is made regarding if/when it should be installed in PEI schools. Not all patches or updates are installed. In addition to ensuring prior testing and an organized installation plan; coordination of updates is also important to ensure all schools are operating on the same “build” – a necessity to the successful transfer of records between schools and for snapshots to the board.

Under normal circumstances, an update will be installed through ITSS end user support personnel, as part of a provincially-organized project. Other arrangements may be put in place for installing a patch. Updates or patches SHOULD NOT be installed by schools without board or provincial approval. Sometimes, if a school is requesting support from Trevlac, they may suggest to the school that they run a specific update – if this occurs, consult with your board or provincial contact before proceeding. NEVER INSTALL A PATCH OR UPDATE WITHOUT APPROVAL.

Approved files are made available on a provincial ftp site. Trevlac uses a consistent naming standard for their files – updates are named 7qkwvf9xxxx.exe and patch files are named 7pchvf9xxxxpy.exe – where xxxx indicates the issue date of the update, and y indicates the “patch version” number (plus, possibly, a letter) of the patch related to that update.

Usual procedure when ITSS personnel are installing an update:
- ITSS arrange a schedule for having the update installed in all schools within a specified period of time; and schools are notified.
- When the update is being installed at a school, there are certain expectations for the primary Trevlac user as part of that process, including:
  - Communicating to all Trevlac users in the school that Trevlac will be unavailable.
  - Putting a checkmark in "Prevent users from signing on" in System/Users Logged In.
  - Ensure there are no users logged in to Trevlac, or have the Trevlac login screen open.
  - Running Remove Deleted Records and Remove Orphans.
  - Checking Trevlac (date and build date) at various points in the process.
  - Removing the checkmark from "Prevent users from signing on" once the process is complete; and notifying users that Trevlac is once again available for use.
You may never have a need to run either the update or patch processes. However, if you do, it is VERY, VERY IMPORTANT that you make a current backup before starting; and that you do not overwrite that backup for a period of time.

How to install a program Patch:
- **Ensure** no users are running Trevlac, and “Prevent users from signing on”
- **Make** a FULL backup of Trevlac – save to the current day’s backup folder, and note the date and purpose in your Backup Log
- **Locate** the patch file on the ftp site (ftp://ftp.edu.pe.ca/TREVLAC7/Patches_Updates/) and save it to a folder on your hard drive or server
- In My Computer, **locate** the patch file (7pchfp9xxxxpy.exe) saved in the step above – **double click** on the file – this will start the patch process
- When prompted, **indicate** what folder is to be patched (the process usually defaults to show c:\trevlac7 - THIS MUST BE CHANGED to show the location of your server-based Trevlac program – usually O:\Trevlac7)
- **Click** on Extract to install the patch
- Run Trevlac – log in as Superuser – check for updated build date and do a quick review of data to ensure everything look’s okay (if you are aware of some change the patch was intended to make, check on that, if possible) - remove check from “prevent users from signing on”

How to install a program Update:
**NOTE:** Updates cannot be installed to Trevlac on the network server. Therefore, a copy of the program must be made on the hard drive, the update run on that copy, then the updated version on the hard drive is copied back to the server.
- **Ensure** no users are running Trevlac, and “Prevent users from signing on”
- **Make** a FULL backup of Trevlac – save to the current day’s backup folder, and note the date and purpose in your Backup Log
- **Make** another FULL backup of Trevlac – save to C:\Trevlac_Files\TREVUP folder – this is the copy on which the update will be run
- **Locate** the update file on the ftp site (ftp://ftp.edu.pe.ca/TREVLAC7/Patches_Updates/) and save it to a folder on your hard drive or server
- In My Computer, **locate** the update file (7qwkfp9xxxx.exe) saved in the step above – **double click** on the file – this will start the update process
- When prompted, **click** the CONTINUE button on the Trevlac7 update setup screen; **click** the OK button when the Name and Organization screen appears (adjust information if necessary); **click** the OK button again to confirm
- When prompted, **indicate** the location of the folder to be updated (the process will default to show c:\trevlac7) - THIS MUST BE CHANGED - **click** on the CHANGE FOLDER button and **locate** the copy to be updated (C:\Trevlac_Files\TREVUP\Trevlac7)
- **Click** OK to return to the previous window – the directory next to the Change Folder button should show C:\Trevlac_files\TREVUP\TREVLAC7. If the location is correct, **click** OK
- On the next screen (which still shows the folder location to be updated), **click** on the large button that looks like a monitor - near the top of the window - to start the actual update process
Execution of the update will copy all the files necessary, and then start a reindexing process. If an Open window with a list of table names appears, then click the Cancel button on the Open table window and continue through the process. If you get an Open window or any other error during the update process, you should re-run the update.

- **Run/test the updated program** before copying it back up the network – in My Computer, locate the C:\Trevlac_Files\TREVUP\TREVLAC7 folder and double click on the school.exe file to start the program – log in and check program
- Once the update has been run and tested successfully – copy the updated program back up to the network - copy the TREVLAC7 folder from the Trevup folder back to the server drive where it is normally run from. If prompted about replacing files, answer “yes to all”
- Log in to Trevlac as Superuser and uncheck “prevent users from signing on”

**How to “re-run” an update:**
This may occasionally be necessary if an update does not install properly. To do this, first to go the folder where the updated Trevlac is located (c:\trevlac_files\trevup\trevlac7), highlight and delete the SETUP folder (a subfolder of Trevlac7). Then re-run the update process, starting with the "5th" bullet above. If there are still problems, contact the Trevlac Support Line. Your data may have to be repaired in order to be updated correctly. If the update runs correctly you should eventually see a window that indicates the update ran successfully, and asks you to reboot your computer. Click the OK button.
POP-UP VALIDATIONS

“Pop-up” validations have been created for various fields within the Student Information area. The pop-ups show available/allowable settings and their definitions for various fields.

Pop-up validations can be updated by importing a file that contains the updated information, or by updating the individual validation file for a particular field from within the program.

[Some other fields validate to a program file instead of to a "pop-up" file - for instance: grade - Grade Definition file; home room - Home Room file; status - Student Status file; staff names and codes - Staff Information file; Calendar ID - School Calendar file; course codes - various course files; attendance; discipline; etc. These are not part of the import process.]

With the exception of creating validations for a school-defined field, you should NOT import or change any pop-up validation files without approval from your board or provincial contact.

Importing a Pop-Up File
- When provided with an updated file (.csv), save the file to a location on your hard drive and remember the location.
- Run Trevlac and log in.
- From the Trevlac menu choose: Areas / Student Area / Student Master.
- Go to a screen that has one or more fields that are empty and have no existing pop-up validations (perhaps the PEI screen – Field 1, 2 or 3).
- Place cursor in one of those empty fields.
- Type ?
- Click on the Import button.
- In the Import window - leave Type as CSV-comma separated values – use the browse [...] button to locate the file to be imported – click on the file, then click on OK so the chosen location appears in the From line on the Import window.
- Click on the green checkmark to import.
- Click on the red x to leave the Popup Validations window.

Updating
You are not advised to manually edit individual pop-up validations, especially those with provincial standard entries.

How to update:
- Run Trevlac and log in.
- From the Trevlac menu choose: Areas / Student Area / Student Master.
- Go to the screen where the field to be updated is located and place cursor in that field.
- Type ? – the Pop-Up Validations window will appear.
- To change an existing entry: highlight that entry in the Entries list, then edit in the text in the box below.
- To change the description for an existing entry: highlight that entry in the Entries list, then edit the text in the Description box.
• To add a new entry: click on the + button, then replace the New entry that appears in the box below the Entries list with the new pop-up value; enter a Description for the new value in the Description box
• Click on the Save button to save any changes
• Click on the red X to exit the Pop-up Validations window

**To See a List of Pop-up Validations**

There are a number of methods to see and choose from the pop-up validations associated with a field. After placing the cursor in that field:
1. Hit the space bar – a complete list will appear. (If this does not occur, check to make sure there is a checkmark next to System / Popup Valid Entries
2. Type a ?.
3. For a limited list, start typing – entries that match what you have typed will be included in the list that appears.
REGULAR PROGRAM MAINTENANCE

A routine should be established for performing various maintenance functions that will support a healthy Trevlac program, and help maintain uncluttered hard drive and/or server folders.

**Remove Deleted Records**
The Remove Deleted Records operation helps "clean up" the computer drive by removing records (bits of data) that have been changed. This function should be run at least every week or two.

How to run Remove Deleted Records:
- **Run** Trevlac and **log in** as Superuser
- From the Trevlac menu **choose:** System / Users Logged In - **click** to “prevent users from signing on”
- From the Trevlac menu **choose:** System / Remove Deleted Records
- **Click** on the green checkmark – process will run
- From the Trevlac menu **choose:** System / Users Logged In - **remove** checkmark from “prevent users from signing on”

**Remove Orphans**
The Remove Orphans operation also helps "clean up" the computer drive by cleaning up areas in the program or parts of records that might have been left open when the program shut down due to errors. This function should be run at least every week or two.

How to run Remove Orphans:
- **Run** Trevlac and **log in** as Superuser
- From the Trevlac menu **choose:** System / Users Logged In - **click** to “prevent users from signing on”
- From the Trevlac menu **choose:** System / Remove Orphans
- **Click** on the green checkmark – process will run
If any information pops up when this finishes, it can be closed – it is a list of the orphaned records that have been removed
- From the Trevlac menu **choose:** System / Users Logged In - **remove** checkmark from “prevent users from signing on”

**Temporary Files**
Another cleanup procedure involves deleting any files in the main Trevlac7 folder with the extension .env or .tmp. These are temporary files, and can be deleted through My Computer.

**Maintain Error Log**
An entry to the error log is created each time an error experienced by the program. Under System/Maintain Error Log you can view a list of error messages, when they occurred, and to what user. This information may be requested when communicating with Trevlac techsupport.

A record of errors should be kept for a reasonable length of time. However, older messages can be deleted from the log. As a “rule of thumb,” you could plan to
delete any entries more than a year old. To do this, highlight the entry and click on the Delete button.

**General File Cleanup**

Various files – especially those in the various folders on your hard drive or server – should be deleted after a period of time. On the hard drive, these are generally located under the primary folder C:\Trevlac_Files; on the server, they will usually be in a sub-folder of the $tudent_records_archives folder (originally created in most schools during fall 2011).

Files that can be deleted include older copies of: transfer in files, transfer out files, snapshots, export files created for the Department of Education or others, crystal reports, pop-up validations, update or patch files.

PDF versions of reports cards and transcripts also fall into this category, and are generally stored in a sub-folder of $tudent_record_archives. The recommendation for retention of these report card and transcript files is three to five years (*provincial Student Records Management Steering Committee – October 2011*).

With the exception of Temporary Files (described above), no files should be deleted from the main Trevlac7 folder without prior consultation.

**Files inside the Trevlac Program**

Within the Trevlac program, there are files and other items that should be reviewed periodically; and old, unused, or replaced items should be discarded. These include:

- Saved queries
- Saved tallies
- Saved universal updates
- Old crystal reports
TREVLAC SUPPORT

On PEI
Gerard MacDonald, Provincial Trevlac Consultant (contracted through ITSS in consultation with the Department of Education)
Cell Phone: 628-7340
Home Phone: 676-2957
E-mail: gcmacdonald@edu.pe.ca


ITSS Service Centre: http://unicentre.peigov/CAisd/pdmweb.exe
(Phone: 620-3600)

Support is also available from your board’s Trevlac contact(s).

Trevlac Computer Services
Trevlac help line: 1-800-363-3633 or 1-800-265-1653
Trevlac support e-mail: techsupport@trevlac.com
Trevlac website: www.trevlac.com (login information required to access Client portion of the site)
Direct phone line: 705-793-9004
Fax: 519-686-6664

Crystal Reports: Wendy Sue Reid – MUST include official request form
E-mail: wendy@trevlac.com
Fax: 1-416-850-4376

Trevlac Computer Services
PO Box 25025
London, Ontario N6C 6A8

Updated March 2012
TRICKS & TROUBLESHOOTING

Keyboard Navigation
In some instances, you may find the use of various keyboard shortcuts to perform various functions – instead of using the mouse to click the buttons. Trevlac has incorporated a few, which are standard to many software packages, which are accessed by holding down the Ctrl key while typing a letter.

In most Areas, these keyboard “shortcuts” can be used to navigate in the Entry screen:
- Ctrl+W - Create New Record
- Ctrl+U - New With Value
- Ctrl+S - Save Record
- Ctrl+N – Next Record
- Ctrl+P – Prior Record
- Ctrl+F – First Record
- Ctrl+L – Last Record
- Ctrl+M (from the main Trevlac screen) - Go directly to the Student Information/Simple Query screen

General Notes
Remembering the following may help decrease frustration:
- In LIST mode, if scrolling to find a specific record, remember to click on that line/record before returning to ENTRY mode.
- In LIST mode, data can be sorted in a different order by double clicking on the header of a column.
- Most functions have two steps - they require the selection/creation of a query before they are run.
- When working on a query, save it often while creating it - if you decide later you do not want to keep it, it can be deleted.
- When adding or changing data, remember to save the changes with the SAVE button.
- Most the toolbar and other task-performing buttons (close, query, save, open, new, etc.) have the same meaning regardless of where they appear in the program.
- If you have a certain order of records, or particular fields you would like to see in the query table, in your day-to-day access to Trevlac, you can create a query that meets those needs and make a habit of running it when you enter Trevlac.
- A query which includes Fields to Display from various screens will not include any records for which one of those screens was not created (see Queries for more information).
- Where data entry is validated against “valid entries” or “pop-ups”, the available entries which meet the criteria of what you start to type are the only ones that will appear in the pop-up window. If the starting letters/numbers of your typing do not match any of the valid entries, then all the available entries will appear. This applies to fields that are defined in a separate file (e.g. home room, grade) as well as entries that are defined with pop-up validations (e.g. address type, contact method, entry and exit types, etc.). When a pop-up window appears, you can choose an entry by clicking on it and hitting Enter, or by double-clicking on it.
**Toolbars**
The toolbars (there are two in the Student Information area) can be moved (dragged) anywhere on your working screen so if, for instance, you are making entries to the same field on a number of records, you may want to move the toolbar with the Save and Next buttons close to the field you are working on to reduce excessive mouse movement.

Some useful toolbar buttons:
- **Query** - takes you back to the Simple Query window - useful for querying individual records, or to go back to the Saved Queries area
- **ReQuery** - re-runs the current onscreen query - useful if changes have been made to records - requeried table will reflect those changes (e.g. if query includes Active status, and some records have been changed to another status, they will not be excluded from the onscreen table until it has been "requeried."
- **Arrows** - will move forward or back one record, or to beginning or ending of table
- **New** - allows for creation of new record
- **New With Value** - allows for creation of record, starting with all the same data as the onscreen record - useful for creating new record for sibling of an existing student
- **Save** - lights up when any changes have been made to the onscreen record - use to save changes
- **Close** - although most Areas are usually closed using the Close "X" or a localized Close button, the **Close button on the toolbar** can also be used for this purpose. Where an error has occurred and the user is experiencing difficulty exiting a screen, the Close button will often perform the task.

The second toolbar, which appears only in the Student Information area, provides another option for moving among the various student screens - with a stylized button to represent each screen. You may wish to familiarize yourself with these buttons.

**Restoring Toolbars**
Occasionally toolbars will disappear from the screen, without explanation. They can be restored by deleting the relevant lines from a Trevlac program file. This process must be done outside Trevlac, in Windows Explorer or My Computer.
- locate the main Trevlac drive and folder - double click on the Trevlac7 folder
- double click on the sa.ini file (you may be able to see the whole name - “sa.ini” - or just "sa"

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- when this file opens, scroll through the file to find the following two lines, where the *username* is the user for whom the toolbars have disappeared:
  
  
  *username*master_toolbar=numbers
  *username*navigation=numbers
  
  example: SUPERUSERmaster_toolbar=0,0,379,32,422
  SUPERUSERNavigation=0,0,0,32,379
  
- delete those two lines for that user
- save the file
- toolbars should be restored to default

**Trevlac Help Menu**

The Trevlac program contains an extensive help menu which should be consulted when there are questions about how something should be run, how files interconnect, etc. Although our PEI reference manual contains specific instructions for performing some of the more routine functions, its main purpose is to supplement the Trevlac help menu by providing a reference that relates to areas specific to Trevlac users on PEI, and to each individual board.

The Trevlac corporation, from time to time, updates the information available in the Help file; and such updates are added to your program as part of a program update. Please note, however, that the program’s Help descriptions are not always updated with the most current information.

To access the Trevlac Help menu: Choose Help from the menu bar - then choose Contents for an index of general topics/areas or Search for Help On for a more detailed alphabetical index.

**Data Viewing/Entry Issues**

*Pop-Up validations list* does not appear when you start typing, or when you hit spacebar – To fix: Check under System – there should be a checkmark next to "Popup Valid Entries." If it's not there, click on it to enable.

*Query by Example* window appears when you go to Areas, then choose an area to enter (e.g. Areas/Student Area/Student Master) – To fix: Check under System – there should be a checkmark next to "Simple Query Mode." If it's not there, click on it to enable.

*Date of Birth* – Sometimes, when entering a date of birth, *** shows up instead of the numbers typed. If you keep typing until the cursor moves to the next field, this will usually resolve itself, and the proper DOB entry will appear.

*Queries – Multiple lines per students* – There are instances where queries do not return the expected result; in particular, when records are missing, or there is more than one line in the table for some students. See Section 7 for some troubleshooting tips relating to queries.

**ODBC Settings**

The Trevlac database program is built on a Microsoft Visual FoxPro framework. When data is accessed by an external program, such as printing a Crystal Report, the system must know where to find that data on your system. The ODBC (Open Database Connectivity) settings must point to the correct data source. If a Crystal
Report gives you the wrong information, then the ODBC settings are pointing to the wrong data source. If it gives you a 1429 and 13 error, then the ODBC settings are not set up or set up incorrectly. An incorrect ODBC setting can also result in an SQL statement returning incorrect results. Also, since winter 2010/11, it seems the ODBC must be set before the Special Education screen can be accessed.

**To Check/Change ODBC settings:**

Click on the “Start” button in the lower left corner of your desktop display. Select “Control Panel” from the menu. In Windows 95/98 systems select “Data sources.” In Windows XP select “Administrative tools” then “Data sources.”

Select the second tab in from the left called “System DSN.” You should see the following:

- Name: sasdb - VFP   Driver: Microsoft FoxPro Driver

If this is not what appears:
- click on **ADD** and select the Microsoft FoxPro driver from the list (it is usually close to the bottom), then select **FINISH** - a setup window will appear
- in the space “Data Source Name” type **sasdb - VFP** (sasdb<space>hyphen<space>VFP)
- repeat this in the “Description” field
- under Database Type select Visual FoxPro Database(.DBC)
- in the “Path” field, click on BROWSE and go to the Trevlac folder you are using (i.e. O:\Trevlac7) - double click on the file “SASDB.DBC”
- click on “Options” and select “General” from the “Collating Sequence” list
- the two boxes “Exclusive” and “Fetch Data in Background” should not be checked

If the name and driver are present:
- select “Configure”
- check the “Path” and if it is not pointing to your current database click on “Browse” and go to your current database (i.e. O:\Trevlac7\) and select “SASDB.DBC”
- click on “OK” and “OK” and exit the “control panel”

Once the correct ODBC settings and data location are in place, Crystal reports should now print successfully and print the correct data.

**Printing - Crystal Report Errors**

- Error 1429 and 13 – indicates the ODBC settings are not set up, or are set up incorrectly. See above on how to check/remedy.

- Error 1733 – In Report/Crystal Reports – on the lower right portion of the window – ensure Preview is selected – make sure there is no checkmark beside either “Use Crystal CRPE” or “Use Trusted Connection.”

**Special Education Screen/Reports**
For specific information on troubleshooting related to this Area, see Section 4.

**Winzip**

A program used extensively in conjunction with the Trevlac School Administrator to create and open zip files for snapshots, transferring students, and
similar procedures - will not work properly if any of the folders it is accessing are not named using the correct format. With that in mind, you should ensure that the name of any Trevlac-related folder (directory) does not contain spaces (e.g. treвлac 7) or extensions (e.g. treвлac.bak). Where a problem is encountered with a function that uses Winzip, the folder name would be one of the first things to check. Another would be to ensure that you are using a computer that is running a licensed version of the Winzip program – usually available on the primary Trevlac user’s computer (more recently this may be available on all computers in the school office).

**Snapshots**
Usually an error when trying to create a snapshot means one of two things – either (1) the folder you have told the program to save your snapshot to no longer exists; or (2) WinZip (the licensed version) is missing from your workstation.

Check in System/Create Snapshot to see where the snapshot is trying to save the file (usually c:\trevlac_files\snapshots) – then check to see whether the folder referred to actually exists. If it does not, either create it or change the location where you are saving the file. A missing Snapshots folder will often result in an error of W250.

If it appears WinZip is missing, contact the IT Service Centre using your school's normal channels for service notifications.

**Maintain Error Log**
File Repair after an Error
The Source Code area in this file will indicate the file that may have been corrupted. **Note: Most of these errors will be corrected by exiting the program and logging back in.** If not, before calling for support, you can attempt to repair the damage by "repairing" and "reindexing" the file. First, note the filename in the Source Code. Make sure everyone is out of Trevlac. Then right click on the Start button on your main computer screen, click on Run, and, in the Open field, browse to find your main Trevlac folder, then, following the folder name, type `repair` and the filename -- do the same with `reindex` and the filename.

For example, if the Source Code shows the filename `g_calendar`, with a Trevlac folder called Trevlac7 on the i drive, in the Run area you should type:

```
i:\trevlac7\repair g_calendar
i:\trevlac7\reindex g_calendar
```

You should see the files being reindexed. The program will seem to open and you will see a box appear with the files being repaired/reindexed flash past. If this does not happen then the repair/reindex did not work. **IF THIS DOES NOT WORK, CALL FOR SUPPORT.**
USER LABELS / ENTER DESCRIPTORS

Fields on various screens can be labeled by the user. Within Trevlac, these fields are commonly referred to as “user definable (ud) fields.” Some of these fields / labels have been defined by the board or department - others can be used and labeled at the school’s discretion. (See Section 3: Student Records – Data Entry Guidelines for an indication of the definition of each field – including whether its use has been board or provincially defined.)

In the Student Information Area, labels can be added to fields on most screens, including:
- Student Master screen - Additional Information - 40 ud fields
- Demographic screen- 10 ud fields
- User Definable screen - 85 ud fields (4 pages)
- PEI screen - fields 1 through 6 at bottom of screen
- Special Education Screen – 6 fields (pre-defined by province)

How to label ud fields on the PEI screen:
(DO NOT re-label without provincial approval)
- Run Trevlac and log in
- From the Trevlac menu choose: Utilities / General / Province/State/Region Specials / PEI Labels
- Enter labels
- Click on green checkmark to Save and Close

How to label ud fields on all other student information screens:
(DO NOT re-label provincially-designated fields without approval)
- Run Trevlac and log in
- From the Trevlac menu choose: Utilities / Student Information / Enter Descriptors / (choose screen)
- For each field to be labeled, replace the “ud” entry or previous label by highlighting it and typing the label you wish (Student Master Additional Information and User Definable have more than one page of entries - use page tabs to change pages)
- Click on green checkmark to Save and Close

Other Areas:

Ud fields in other Areas of the program can be labeled in a similar manner. See the Trevlac Help menu Index under Label, Labeling, or Labels for additional information.
USERS LOGGED IN

The Users Logged In screen displays all users currently logged into the system. There is also a spot to be checked to "Prevent Users from signing on" which is only available to Superuser. This lock-out must be enabled to run such functions as Remove Deleted Records and Create a Snapshot, and when planning to make backups or run a program update.

NOTE: The “delete” button in this window does not actually accomplish anything, and should not be used.

How to determine users logged in and prevent additional users from logging in:

- Run Trevlac and log in as Superuser
- From the Trevlac menu choose: System / Users Logged In
- To keep others from being able to log in to Trevlac, click to place a checkmark next to “Prevent users from signing on”
- Close the window

NOTE: Users not logged in, but with the Trevlac login screen open on their workstation, can negatively impact processes that require all users to be logged out of Trevlac. A communication network needs to be established in schools, as well as procedure for this not to occur.

How to reinstate access for other users:

- Run Trevlac and log in as Superuser
- From the Trevlac menu choose: System / Users Logged In
- To allow others to once again be able to log in to Trevlac, click to remove the checkmark next to “Prevent users from signing on”
- Close the window
MY SCHOOL’S TREVLC SYSTEM INFORMATION SHEET
(print, complete, and keep on hand for school reference and end user support)

School Name: ______________________________

Our SUPERUSER is (name of staff member): ______________________________

The main TREVLC7 folder is located in (server drive letter): ____________

Backup folders are located:  ( ) On the network server; or
(   ) On ______________’s hard drive
(folder location: Trevlac_Files/Backups/)(sub-folder names: 1MONDAY, 2TUESDAY, 3WEDNESDAY, 4THURSDAY, 5FRIDAY)
(This refers to backups created in addition to regular network backups)

Backups are performed by (staff member): ______________________________

Our Backup Log is filed (location): ______________________________

Snapshots are saved to: (   ) C:\Trevlac_Files\Snapshots; or
(   ) Other: ______________________________

Transfer files (in/out) are saved to: ______________________________

Crystal Reports are saved to: ______________________________

Photo files are saved to: (server drive):\Photos

StudentsAchieve-related files (in/out) are saved to:
(server drive):\$tudent_record_archives

Report cards and Transcripts (.pdf version) are saved to:
(server drive):\$tudent_record_archives

WINZIP (licensed) is installed on ______________’s computer

Program update or patch files are saved to: ______________________________

To run program updates, TREVLC7 is copied to: (   ) C:\Trevlac_Files\TREVUP
(   ) Other: ______________________________

This information was last updated on: ______________________________

Updated March 2012