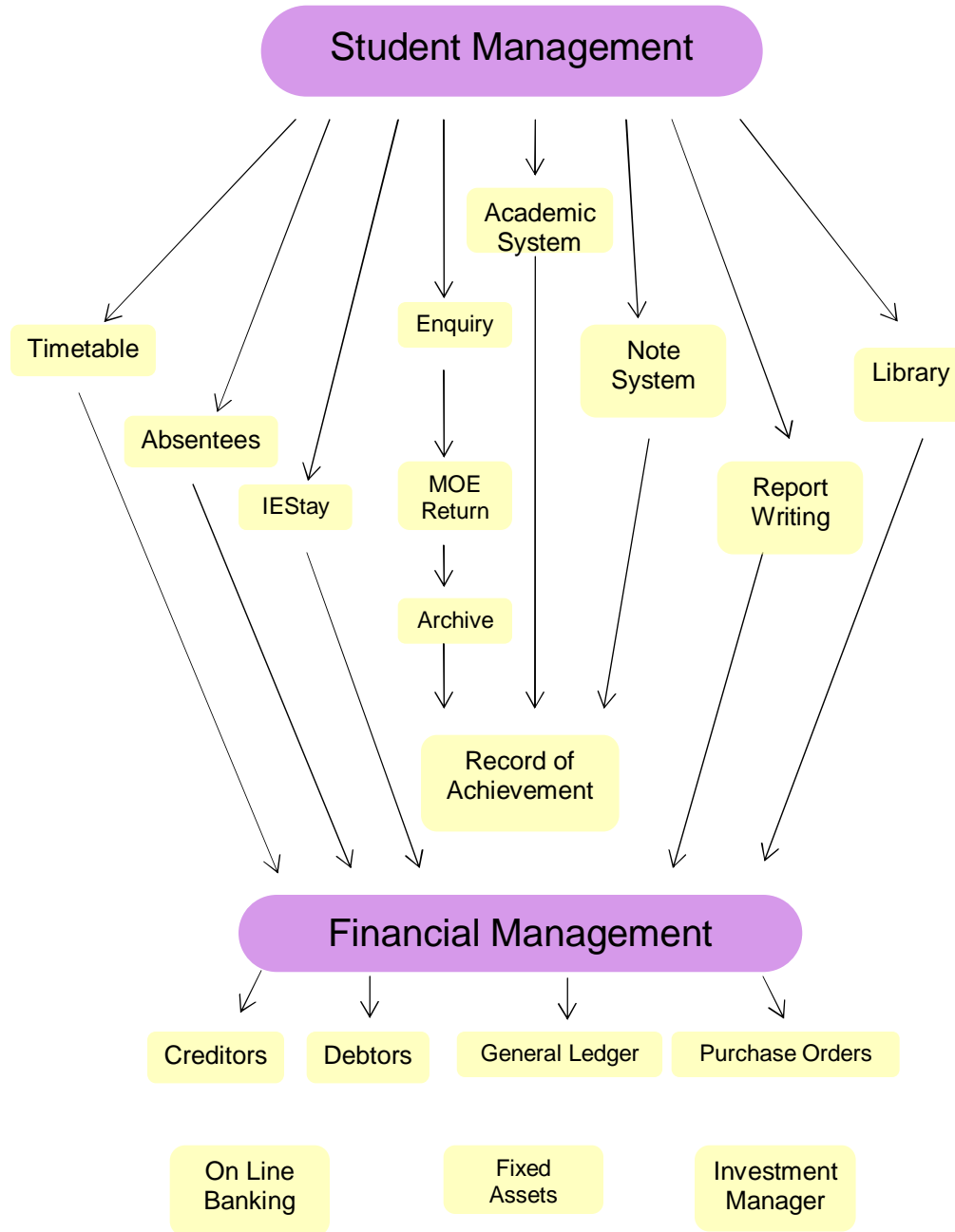




# Welcome to the IES System

## Student Enquiry



**Buy IES Buy Time**

Email: [ies@ies.co.nz](mailto:ies@ies.co.nz)  
Website: [www.ies.co.nz](http://www.ies.co.nz)

Integrated Education Software  
PO Box 1490 Rotorua New Zealand

Phone: +64 7 348 4585  
Fax: +64 7 346 1272



# The IES System

## Comprehensive Education Administration System

### IES Software

**Student Management Software**

**Financial Management Software**

**Library Software**

### IES Services

**Software Support**

**Full Financial Bureau Service**

**Accounting Support and Advice**

**Administration Support and Advice**

**Bureau Service for Student Management**

**Buy IES      Buy Time**



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## IES – The Company

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- ∅ Committed to education
- ∅ 20 years in the education market
- ∅ Working Directors
- ∅ Adaptable to constant changes in this unique market



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## IES – The Software

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- ∅ Integrated
- ∅ Comprehensive
- ∅ Timesaving
- ∅ Developed In-House
- ∅ Continually updated for changing situations
- ∅ Secure



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## IES – The Support

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- ∅ Timely
- ∅ Experienced, knowledgeable staff
- ∅ Remote access available
- ∅ On-going training



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## IES – The Service

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- ∅ Personalised
- ∅ Friendly
- ∅ Advisory Service for peripheral issues
- ∅ Network & Hardware assistance



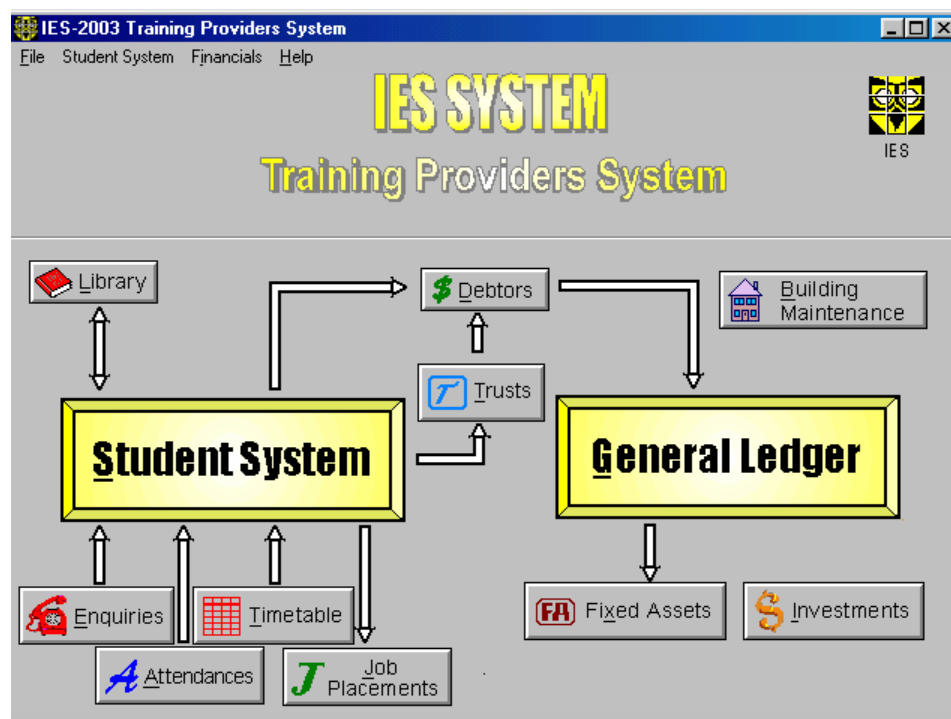
# IES PTE System

The IES PTE System covers the following Modules.

§ Student System

§ Enquiry System

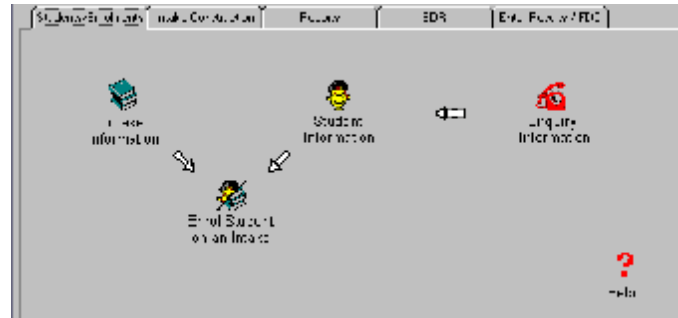
§ Other Systems





## IES Student System

The IES Student System is designed to efficiently handle the administration of students in the private education sector.

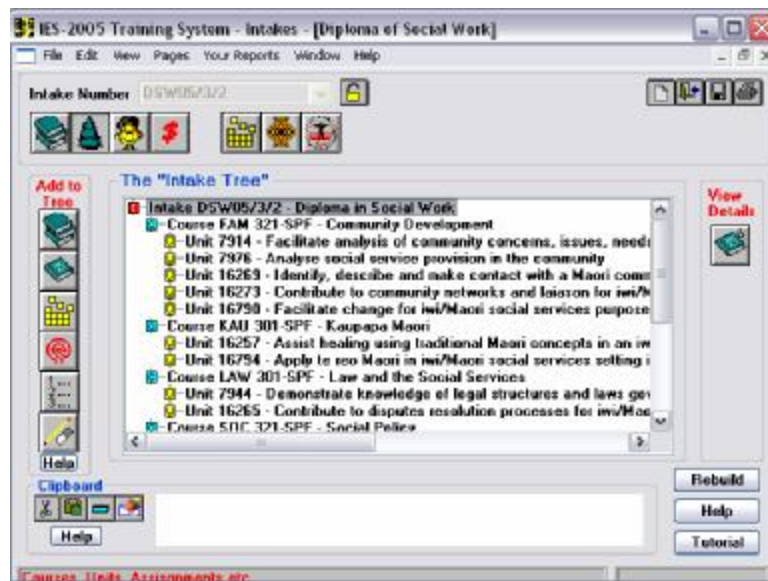


IES is a series of modules that link to create an entire administration package. The key to IES is the ability to integrate data between modules. This means that data need only be entered once to flow through the entire IES System.

The IES Student System is designed to maintain details on:

- Students
- Intakes
- Courses
- Student Results

### Intake Construction



This maintains a list of students, courses, elements, units/modules, performance criteria, learning objectives and other statistical information.



# IES Student System - Enrolling System

## Enrolling Students

Student No. or Name: 000000

**Identifying Details**

Surname: EDWARDS  
Forenames: KATHLEEN ALICE  
Name Used: Kat  
Address: 38 Churchil Street  
WHAKATANE  
Phone: 307 7332  
Mobile:  
Email:  
Fax:  
Birth Date: 07 MAR 1965 Age: 40  
Sex:  Male  Female  
Verification Method: P

**External Reference Numbers**

IRD No.: 45 272 923  
WINZ No.: 141 911 722  
NZQA No.: 016 598 9519 Rol?   
Skill NZ No.:  
STAR No.:  
NSI No.: 105789519  
Account No.:  
MoE No.:  
Insurance No.:

**Contact Details**

Contact Person: Red Edwards  
Contact Address: 30 Shaw Road  
WHAKATANE  
Contact Phone: 308 6576

Group: Site:

Student Identificatio Details

A student may be entered on one or more intakes.

The start and end dates, courses, elements, unit/modules, assignments, materials may be tailored here for each student on an intake. This area maintains a list of work experience details and can record results for each assignment, element, unit and course.

## SDR

The Student System exports the data required for the Single Data Return.

Generating  
SDR Data Report  
Intake Report  
Print Income Report  
Outcomes

**SDR**  
Single Data Return

Courses  
Student Information  
Enter Student Details

IES maintains a close liaison with Tertiary Resourcing to ensure the Student System is modified to meet any future changes to the SDR.

IES also provides support to users to complete their SDR.



# IES Student System – Unit Results and Reports System

## Student Unit Results

The **IES** Student System has an interface facility to electronically record Student Unit results. The Unit Results may be entered into **IES** by Unit or by Student. At any time the Unit Results may be emailed to NZQA

## Reports

A wide range of reports are produced from the database including:

- Students
- Staff/Tutors
- Unit of Learning
- Intakes
- Outcomes
- Statistics

**IES** is designed specifically to meet the reporting requirements of:

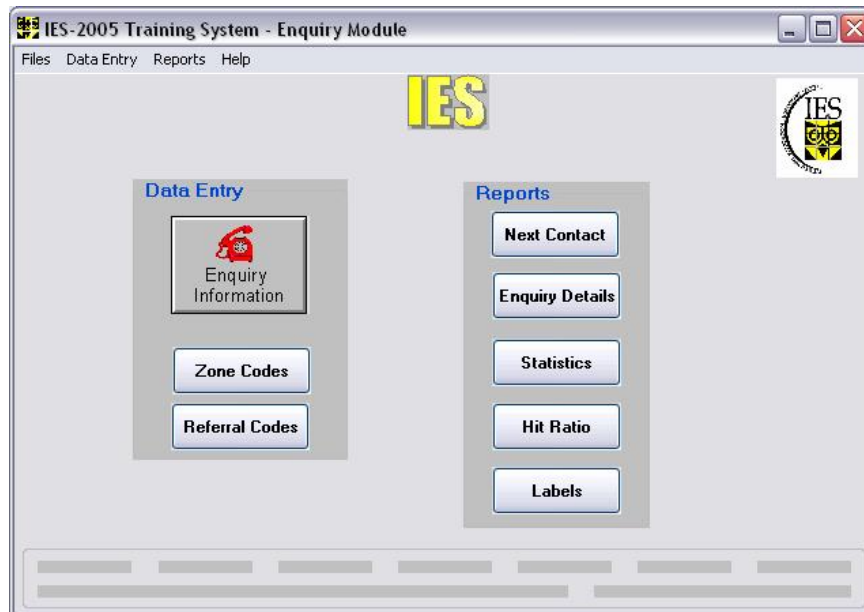
- The Provider
- TEC
- NZQA
- Ministry of Education
- Workbridge
- NSI

**IES** also has a facility for designing your own reports.



## IES Student System - Enquiry System

The Enquiry System records all enquiries made from prospective students about courses offered by a provider.



This System holds details on each enquirer in an area separate to the main Student System database. On confirmation of acceptance to a course, the student's details are transferred simply into the Student System and enrolled onto the selected course.

As a marketing tool, the Enquiry System keeps a record of the number of enquiries for a course to produce statistics of actual enrolments against inquiries.

It also provides a breakdown of enquiries by zone (ie physical location), referral (radio, television, etc) gender and age. Details on when course information is sent and when a follow-up is required are also maintained in this system.





## IES Student System - Other Systems

In addition to maintaining data on student details and courses, the IES Training System has a number of other facilities including:

### Attendance

Attendance or Absenteeism may be recorded and reported on a daily or hourly basis. Attendance sheets may be printed.



### Timetable

The timetable (tutor, room, time) for classes may be recorded and printed.

### Job Placement

Details on Companies, Vacancies and Student Skills may be maintained in this module. A matching program is available to link students to vacancies. Data on placements is kept for historical reference.





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# IES Pastoral System

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The IES Pastoral System is designed to maintain details on 'incidents' which may occur with the student. They fall into 3 broad areas:

Discipline

Positive (eg seeking a career)

Neutral (eg personal issues, health issues)

## **Features**

- ∅ Speed of entry is critical (eg 10 seconds to record basic details)
- ∅ Letter writing facility greatly reduces time to write to caregivers
  - Standard letters may be created (over 200 is common)
  - Create letter 'on the fly'
  - Modify standard letter for 'one-off' letter
  - Handles gender issues (eg he, she, his, her)
  - Prints details on incident
- ∅ Points system, based on incidents, to pick up difficult students
- ∅ Detention system based on incidents
- ∅ Extensive reporting

## **Benefits**

- ∅ Fast and accurate data entry
- ∅ Builds a broader perspective of student at school
- ∅ Requires very little training for staff to use
- ∅ Accessible by accredited users on network
- ∅ Strong security facilities to block unauthorised users
- ∅ Powerful tool to handle discipline and other pastoral issues
- ∅ Points system (positive incidents) may be used for House / Class competitions,



# IES Financial System



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# IES Debtors System

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The IES Debtors System is designed to handle the charging of Debtors, their payments and the printing of statements.

## Features

Comprehensive and flexible

- Ø Use Interfaces to create Debtors
  - IES Student System - select students (eg all or selected students)
  - IES Staff System - create staff as Debtors
- Ø May charge a fee for a group of students or staff
- Ø Interface to IES General Ledger to update accounts:
  - Charges made to Debtors
  - Payments made by Debtors
- Ø Facility to charge interest on outstanding balances
- Ø Facility to age balances at any given time
- Ø Bank Schedule used to ensure General Ledger is correct and timely
- Ø Numerous report options
- Ø Interface to IES HomeStay System for International students
- Ø Print Statements
  - Personalised statements may be designed by IES
  - May print amount in other currency signs (e.g. \$US, RM)
  - Message on Statements;
    - § For individual Debtors
    - § All Debtors
    - § Outstanding Debtors
    - § Age of Debt

## Benefits

Fast and accurate data entry

Powerful interfaces greatly reduce data entry and processing time

General Ledger accounts are accurate and up-to-date

Calculation of GST at interface to General Ledger





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## IES Creditors System

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The IES Creditors Systems provides for the processing of payments to Creditors.

### **Features**

- Ø Maintains details on Creditors
  - Payment details – by Direct Credit, cheque
  - Invoices paid
  - Invoices awaiting payment
- Ø Appropriate reports, including:
  - Payment Schedule
  - Payment Check List
- Ø Prints Cheque and Direct Credit Schedules
- Ø Payment blocks can be recorded against creditor
- Ø Interface to IES General Ledger
  - Updates accounts with debit details from invoices
  - Updates accounts with payment details
- Ø Interface to IES Fixed Assets System for new asset
- Ø Interfaces to Bank Software for Direct Credit payments
- Ø Bank Reconciliation

### **Benefits**

Fast and accurate data entry – easy to use

No duplication of Invoice entry

Creditors can be paid at any time



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# IES General Ledger System

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The IES General Ledger has been designed specifically for use in the financial administration of education organisations.

## **Features**

Unique chaining available in the design of a Chart of Accounts

- Provides great flexibility in Chart of Accounts design
  - New accounts added easily
  - Chart structure simplifies report design
  - Structure supports automatic verification of accounts
  - Systems available to verify structure of Chart is valid
- Ø One point data entry
  - Ø Automatically calculates GST
  - Ø Interfaces from IES Creditors, Fees, Funds and Debtors Systems
  - Ø Interfaces to IES Fixed Assets: simplifies adding new assets
  - Ø Ability to operate Ledgers for multiple Accounting Entities
  - Ø Numerous Report Layouts
  - Ø Facility to enter Current, Alternate and Next Year Budgets
  - Ø Previous Years' Ledgers easily accessible
  - Ø Ability to operate in two financial years
  - Ø Comprehensive systems available to check that data has not been corrupted by hardware failures

## **Benefits**

Fast and accurate data entry – easy to use by non-accounting staff

IES staff keeps users informed of changing government requirements

Interfaces from other IES System avoids duplication of data entry and provides for accuracy and timeliness

Interface to IES Fixed Assets ensure Asset Register is always current

Access to previous years' data provides for historic reporting

IES can assist in the design of the Chart of Accounts



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# Purchase Order System

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The IES Purchase Order System is designed to:

- Accept Requests for Purchases from staff
- Place Orders with Suppliers
- Receive goods and services from Suppliers

Interfaces exist into other IES Systems:

## **Creditors System**

- Access creditors
- Create invoices

## **General Ledger**

- Report expenses and payments

## **Benefits**

- Ease of use
- Timely information on requests for goods available to staff
- School's Financial commitment to purchases
- Improved budgeting

## **Advantages**

- Fast data entry
- Enter data once
- Accurate data in many IES Systems





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## IES Investments System

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The IES Investment System is designed to maintain details on investments, in particular maturity date and returns.

### **Features**

- Ø Records Investments details such as investment amount, start and end date, interest rate
- Ø Calculates interest for maturity
- Ø Calculates interest for end of year accrual figures
- Ø Reports may list investments by start date or maturity date
- Ø Reports list investments which mature in a given period
- Ø Handles investments on behalf of other schools

### **Benefits**

Fast and accurate data entry  
Quick reference for current and historic investments  
Useful when re-investing money over holiday periods



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## IES Fixed Assets System

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The IES Fixed Assets System is used to record and depreciate all assets for an organisation.

### **Features**

Flexible usage:

- Use as a Stand alone system - Assets entered directly
- Integrated with the IES General Ledger System - Automatic creation of asset when invoice entered
- Ø Copy facility for multiple Asset purchases
- Ø Records assets for multiple Organisations
- Ø Depreciation for any range of dates within current year
- Ø Handles any number of depreciation rates
- Ø Calculates Diminishing Value and/or Straight line depreciation
- Ø Various data recording fields (Location, Serial No., Person Responsible)
- Ø Control Account check to IES General Ledger
- Ø Extensive Reports
  - Multiple Sort options allows sub-totals for different criteria
  - Reports for asset register, depreciation, departments etc

Report Writer

### **Benefits**

Fast and accurate data entry

Use of codes for data entry to speed entry and for verification

Reconciliation facility to General Ledger

Copy asset facility for multiple assets provides time savings and accuracy

Accuracy of data when interfacing from General Ledger

No double entry of asset details

Asset created when invoice is processed – saves time

Replacement Schedule for financial planning

Depreciation calculated to date (by month and year-to-date)



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# IES Building Maintenance System

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The IES Building Maintenance System keeps details on properties and buildings. The system records details on work which needs to be done and when. It maintains data on work which has been done on the buildings.

## **Features**

- Ø Maintain details on all buildings and rooms
- Ø Record regular maintenance required with dates due
- Ø Record dates for major maintenance
- Ø Record estimated costs
- Ø Record details on work which has been done for comparison
- Ø Reports for maintenance due
- Ø Record contractor details

## **Benefits**

Reports available to plan maintenance  
Reports to assist budget planning  
All information on buildings in one place  
Able to print 5 and 10 year plans of maintenance



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## IES Security System

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The IES Security System controls the access of users into the IES System.  
IES comprises over the 20 separate but integrated systems.  
Some users will require access to all systems  
Some users will be restricted to one system.  
Once in an IES System, you are able to restrict what a user is permitted to do.

### **Features**

- Ø Able to set up users and passwords
- Ø Able to set up groups of users
- Ø Define entry point in IES (eg the IES Library System for Librarians)
- Ø Define what a user is permitted to see in a system
- Ø Define which pages of a student database a user may see (e.g. remove access to confidential pages)
- Ø Option to make database read only
- Ø Report prints security setups
- Ø Special options based on user:
  - Automatic entry to Academic System (displays teachers classes for selection to enter test marks)
  - Automatic entry to Absentee System (displays teachers classes for selection, to mark students as absent)
- Ø Second level of security available
  - Forces minimum length of user name
  - Prevents re-use of user name
  - Restricts log-in time
  - Records failed logins

### **Benefits**

Powerful facilities

Very flexible

Permits special users to be setup for specific tasks

Restrict who may add, delete, change, view students



## **Additional Notes about the IES System**

### **IES – The Program**

IES is written in the Development Tool OpenInsight. This Development Tool was chosen for its versatility and flexibility. It means that the IES System can be readily adapted to User requirements. In the case of our International Schools, we are able to add individual pages in the Student Database to record “Local Information” for reporting purposes. The System is also able to print in various languages, including Asian / Chinese characters.

### **IES Support**

IES offers software support via telephone, fax, email and the IES Website - IEdeSk. This support cost is covered by an Annual Support Fee.

IES can also access clients' IES software via Terminal Server. This is becoming a popular solution for our clients, nationally and internationally, to provide fast assistance to problem solving. For the most up-to-date information about Terminal Server, refer to the Microsoft Website.

Terminal Server is also used by clients for staff to log into the IES System, or other school systems, remotely.

### **IES Upgrades**

IES provides regular upgrades to meet statutory reporting requirements and client requests. These upgrades are available from the Members Section of the IES Website and all clients are notified of the upgrade availability by email.

### **Network Licence Fees**

A Network Licence per user is required to run IES on the Network. The cost is approximately \$US300 per user with a multiuser licence available at \$US6,000.

### **Data Conversion**

In most cases, a school's current Student database and Library database can be converted into the IES System.

### **Installation and Training**

Initial installation, data conversion and training would involve approximately a week for the Student System and a similar length of time for the Financial Systems depending on the use that would be required. The number of modules taken and the number of staff to training would also determine the length of time needed.