

# E-Digitex User Manual

This manual provides a step-by-step guide on how to test and use the core modules of the E-Digitex School Management System.

## 1. Finance Module

This module handles fees, invoices, student balances, budgets, and payments.

### A. Fee Structure

**Purpose:** Define the fees (Tuition, Bus, Lab, etc.) that students need to pay.

**How to Use:**

1. Navigate to **Finance > Fees & Collection > Fee Structure**.
2. Click **Add Fee Structure**.
3. **Name:** Enter a descriptive name (e.g., "Term 1 Tuition").
4. **Fee Type:** Select the category (Tuition, Transport, etc.). Create new types if needed under **Fee Types**.
5. **Amount:** Enter the fee amount.
6. **Payment Mode:**
  - o **Global:** Use this for the total annual fee. This sets a cap for the year.
  - o **Installment:** Use this for parts of the fee (e.g., "September Installment"). Ensure it is linked to the correct grade.
7. **Frequency:** Select how often this applies (One Time, Monthly, Termly, Yearly).
8. **Target:** Select specific **Grade Level** or **Class Section** to apply this fee to.
9. Click **Save**.

**Testing:**

- Create a "Global Tuition Fee" of 1000 for Grade 1.
- Try creating an "Installment 1" of 600 for Grade 1. (Success)
- Try creating an "Installment 2" of 500 for Grade 1. (Should fail or warn if total > 1000).
- Try deleting the Global Fee while installments exist. (Should fail).

### B. Invoicing

**Purpose:** Generate bills for students based on the Fee Structures you created.

**How to Use:**

1. Navigate to **Finance > Fees & Collection > Generate Invoice**.
2. **Class:** Select the class you want to bill (e.g., Grade 1 - A).
3. **Students:** Select specific students or "All".

4. **Fees:** Select the fee structures to include (e.g., "Term 1 Tuition", "Bus Fee").
5. **Dates:** Set the Issue Date and Due Date.
6. Click **Generate**.

#### Testing:

- Select a class with 5 students.
- Select "Term 1 Tuition" (500).
- Click Generate. Verify that 5 new invoices are created in the **Invoice List**.
- Check one student's invoice to ensure the amount is correct.
- Try generating the *same* fee for the *same* student again. (Should prevent duplicates).

### C. Payments

**Purpose:** Record when a student pays their fees.

#### How to Use:

1. Navigate to **Finance > Fees & Collection > Invoice List**.
2. Find the student's invoice (Status: Unpaid/Partial).
3. Click the **Pay** (money icon) button or View -> Pay.
4. **Amount:** Enter the amount being paid.
5. **Method:** Select Cash, Card, Bank Transfer, etc.
6. **Password:** Enter your login password to confirm the transaction.
7. Click **Confirm Payment**.

#### Testing:

- Pay the full amount (e.g., 500). Verify status becomes **Paid**.
- Pay a partial amount (e.g., 200). Verify status becomes **Partial** and remaining is 300.
- Try to pay more than the remaining balance (e.g., 600 on a 500 invoice). (Should fail).

### D. Student Balances

**Purpose:** View a financial overview of a class.

#### How to Use:

1. Navigate to **Finance > Fees & Collection > Student Balances**.
2. You will see a list of classes with total invoiced/paid amounts.
3. Click **View Details** on a class.
4. Switch between tabs (Global, Installment 1, etc.) to see who has paid what.

#### Testing:

- After making a payment in step C, go here and check if that student shows as "Paid" or "Partial" correctly.

## E. Budgeting

**Purpose:** Manage school expenses and allocate funds.

**How to Use:**

1. Navigate to **Finance > Budget & Payroll > Budget Allocation**.
2. **Allocate:** Click **Allocate Budget**. Select a Category (e.g., "Sports"), Period (e.g., "Q1 2025"), Dates, and Amount.
3. **Request Funds:** Staff can click **Request Funds** on a budget line. Enter amount and reason.
4. **Approve:** Admin goes to **Fund Requests**, views pending requests, and clicks **Approve** (Check icon).

**Testing:**

- Allocate 1000 to "Sports" for Jan-Mar.
- Request 200 for "Footballs".
- Approve the request.
- Check the Budget Allocation page. "Spent" should be 200, "Remaining" 800.
- Try reducing the allocation to 100 (less than spent). (Should be allowed based on new flexible logic, or warn).

## 2. Academic Reports Module

This module generates report cards and transcripts.

### A. Bulletins (Term Reports)

**Purpose:** Print term report cards for students.

**How to Use:**

1. Navigate to **Examinations > Reports (PDF)**.
2. **Mode:** Select "Single Student" or "Whole Class".
3. **Criteria:** Select Class/Student.
4. **Scope:** Select "Period" (e.g., Test 1) or "Trimester/Semester" (Term End).
5. **Period:** Select the specific period (e.g., "Trimester 1").
6. Click **Generate Bulletin**. A PDF tab will open.

**Testing:**

- Ensure marks are entered for the student first (see Exams module).

- Select a student with marks for Trimester 1. Generate. (Should show PDF with scores).
- Select a period with *no* marks. (Should show an error message "No records found" instead of a blank PDF).

## B. Result Cards (Web View)

**Purpose:** Quick view of results on screen.

**How to Use:**

1. Navigate to **Examinations > Result Cards**.
2. Select Exam, Class, and Student.
3. Click **Generate**.
4. View the grades, GPA, and remarks on the screen.

## 3. Student Enrollment Module

This module assigns students to classes or programs.

### A. Standard Enrollment (Primary/Secondary)

**Purpose:** Assign new students to a class.

**How to Use:**

1. Navigate to **People > Enrollments**.
2. Click **New Enrollment**.
3. **Class:** Select the destination class (e.g., "Grade 1 - A").
4. **Students:** Select one or multiple unenrolled students from the list.
5. **Date:** Set enrollment date.
6. Click **Enroll**.

**Testing:**

- Create a new student in **People > Students** (do not assign a class yet).
- Go to Enrollments > New.
- Select "Grade 1 - A". Select the new student. Enroll.
- Verify the student now appears in the Enrollment List.

### B. University Enrollment

**Purpose:** Assign university students to a Program/Major.

**How to Use:**

1. Navigate to **People > Univ. Enrollments**.
2. Click **Enroll Student**.
3. **Program:** Select the major (e.g., "BSc Computer Science").
4. **Student:** Select the student.
5. **Details:** Enter Roll No, Date.
6. Click **Enroll**.

**Testing:**

- Ensure you are logged in as an admin of a University-type institution.
- Follow steps above.
- Verify the table shows "Program" and "Level" columns correctly.

## 4. System Configuration

### A. Grade Levels (Auto-Cycle)

**Purpose:** Define grades (1, 2, 3, etc.).

**How to Use:**

1. Navigate to **Academics > Grades**.
2. Click **Create Grade**.
3. **Name:** Enter name (e.g., "Grade 1").
4. **Education Cycle:**
  - If you are a **Primary School**, this dropdown will be hidden/auto-selected to "Primary".
  - If you are a **Mixed** institution, you must select (Primary, Secondary, University).
5. Click **Save**.

**Testing:**

- Log in as a Primary School Admin. Create a grade. Verify "Education Cycle" is auto-set to Primary.
- Log in as a University Admin. Create a grade. Verify "Education Cycle" is auto-set to University.

### B. Departments (University/Mixed Only)

**Purpose:** Manage academic faculties or departments (e.g., Faculty of Engineering, Department of Biology).

**How to Use:**

1. Navigate to **Academics > Departments**.
2. Click **Create Department**.

3. **Name:** Enter the department name (e.g., "Computer Science").
4. **Code:** Enter a short code (e.g., "CS").
5. **Head:** (Optional) Select the Head of Department from the staff list.
6. Click **Save**.

**Testing:**

- Log in as a University Admin.
- Ensure "Departments" appears in the sidebar under Academics.
- Create a department. Verify it appears in the list.
- Log in as a Primary School Admin. Verify "Departments" is **hidden** from the sidebar.