SCHOOL MANAGEMENT SYSTEM

Elimikasasa

The Walkthrough Handbook

Sitting down with the system, one screen at a time.

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Before we start

This handbook is written as if I were sitting next to you at the computer.

It is not a list of features. It is the order you actually do things in, why each step matters, and what goes wrong if you skip it. You do not need to be technical. If you can use WhatsApp and a spreadsheet, you can run this system.

Read it in order the first time. The system is built the way a school is built: some things have to exist before others make sense. You cannot invoice a learner who has not been admitted. You cannot print a report card before marks exist. The order in this book is the order the software expects.

A few words that come up constantly:

WORD	WHAT IT MEANS HERE
Form / Class	The level — Grade 5, Form 2
Stream	The section within it — Blue, West, North
Votehead	A thing money is charged for — Tuition, Boarding, Transport
Term	Term 1, 2 or 3. Almost every screen asks you for one
Sheet	The panel that slides in from the right when you add or edit something
Toast	The small message bottom-right. Green means it worked, red means it did not

Three habits that will save you:

1. **Green toast, or it did not happen.** If you do not see the green message, the change was not saved.
2. **A dialog asking "are you sure" is not an obstacle.** Read it. It names the thing it is about to affect.
3. **When a screen is empty, something earlier is missing.** Nine times out of ten this is the answer, not a fault.

01

The first hour

1.1 Signing in

Go to **elimikasasa.co.ke** and sign in with the username and password you were given.

What you see next depends on who you are. A headteacher, a class teacher, an accountant and a librarian all land on the same address and see different things. This is deliberate — nobody is shown work that is not theirs, and nobody can change records they have no business changing.

If a menu described in this book is not on your screen, you have not done anything wrong. Your role does not include it. Ask whoever manages the system to widen your permissions.

1.2 Look around before you touch anything

Spend ten minutes on the **Dashboard** before doing anything else.

Read the four cards along the top: Total Students, Total Staff, Fee Collection, Attendance Today. Then scroll. Charts for fee collection and gender split, balances per class, recent activity, top defaulters, recent payments.

> **Why this matters** — Everything on this page is calculated, never typed. Nobody keys in "fee collection: 68%". It is what the payment records add up to. That is the whole idea of the system, and seeing it once here makes the rest of the book make sense.

If a card says `--` or "Not marked yet", it means nobody has entered that data today. It does not mean zero.

1.3 The Help button

Top right of every screen there is a **Help** page with the full step-by-step guide to every screen — searchable, with exact button names.

This handbook teaches you the flow. That page answers "what does this particular button do". Use both.

02

Setting up the school

You do this once. Take your time; everything downstream depends on it.

2.1 School Profile

Settings › School Profile.

Fill in the school's contact details, postal address, and upload the logo. Set the branding colours if you want the system to match your school's.

> **Why this matters** — The logo and details here print on every report card, receipt, invoice, ID card and leaving certificate. Get it right once and every document the school ever produces is correct.

The school name is locked. Only support can change it, on purpose — it appears on thousands of historical documents.

2.2 Classes and streams

Settings › Classes.

Create every class level the school runs, and the streams inside each one.

Work through it methodically. Grade 1 Blue, Grade 1 Green, Grade 2 Blue, and so on. If you have only one stream per class, create one anyway and call it what the school calls it.

> **Take care** — Name classes the way your school actually says them. If teachers say "Grade 5", do not type "5". Bare numbers cause problems elsewhere in the system, and every report will read oddly for years.

What happens if you skip this: you cannot admit a single learner. The admission form asks for a class, and the list will be empty.

2.3 Staff, then their logins

Two separate jobs, in this order.

First — Staff Manager › Staff List. Add every member of staff. This is the personnel record: name, ID number, phone, category (teaching or non-teaching), employment details.

Then — Settings › User Management. Give the ones who need it a login. You are creating an account *for a person who already exists* as staff.

> **Why two steps?** — Not everyone who works at the school needs to log in. A cook is staff. A cook is not a system user. Keeping them separate means your payroll covers everyone while your logins cover only who needs access.

2.4 Roles and permissions

Settings › Roles & Permissions.

The system ships with sensible roles — Headteacher, Teacher, Dean, Accountant, Secretary, Librarian. Each already has a reasonable set of permissions.

Adjust only where your school genuinely differs. If your secretary also receipts fees, tick the finance permissions for that person. Do not rebuild the whole matrix on day one.

> **Take care** — Be careful giving out the permission to delete. Most staff need to add and edit. Very few need to remove.

03

Students, from admission to alumni

This is the part you will use most. We will walk the whole life of a learner's record.

3.1 Admitting a learner

Students Manager › Students List, then **Admit Student** (top right).

A sheet slides in from the right with two sections: **Student Details** and **Parent / Guardian Details**.

What you must have: Admission No, First Name, Surname, Gender, Class, Category (Day or Boarding). The system will not let you save without these.

What you should have anyway: UPI (the KEMIS/NEMIS number), date of birth, birth certificate entry number, home county, and at minimum one parent's name and phone number.

> **Why the parent's phone matters more than you think** — It is how every SMS reaches home — fee reminders, results, closing dates, emergencies. A learner admitted without a phone number is a learner whose parent will never hear from the school. If you are going to be strict about one optional field, make it this one.

Fill both sections, click **Admit Student** at the bottom, wait for the green toast.

> **A note on admission numbers** — Use one consistent format across the school — `NGA319`, not `nga319` and `NGA-319` and `319`. The system will accept any of them; your reports, searches and sorting will be a mess forever if you mix them.

3.2 Finding a learner again

The toolbar above the table does this.

Type into **Search name, admission no, NEMIS...** — it matches on all three at once, so a partial name or a partial number both work. Or narrow with the **All Classes**, **All Gender** and category dropdowns.

Clear resets everything. Use it when results look wrong — usually a filter is still on from earlier.

You can also click the **Adm No** and **Name** column headers to sort.

3.3 Looking at a learner's full record

Click the admission number, the name, or the eye icon.

The profile sheet opens with four tabs: **Personal**, **Academic**, **Parent / Guardian**, **Library**. One learner, everything the school knows, in one place — including what they have borrowed from the library and never returned.

To add their photo: hover over the photo area and choose Upload/Change/Remove.

> **Why bother with photos** — The photo you upload here is the one that prints on ID cards and report forms. Do it once at admission and you never think about it again. Do it in a panic the week ID cards are due and you will be chasing 400 photographs.

3.4 Editing a record

The pencil icon on the row, or from inside the profile sheet.

Change what is wrong, save, green toast. There is no approval queue — an edit takes effect immediately.

> **Take care** — Changing the admission number is not like changing a name. It is the key that ties the learner to their fees, marks, and library loans. Do not change it casually. If it is genuinely wrong, fix it early — the longer you leave it, the more history is attached.

3.5 Removing a learner — and why it is not deleting

This is the part people misunderstand, so read it carefully.

Click the **trash icon** on the row, or **Remove** inside the profile sheet. A dialog appears named **Remove Student** and asks you to confirm.

The learner is not deleted. They are marked as transferred and moved to the Transferred List. Their fees, marks and history stay exactly where they are.

To remove several at once: tick the checkboxes down the left, then **Remove Selected** in the bar that appears, and confirm the **Remove N Students?** dialog.

> **Why it works this way** — A learner who leaves in Term 2 still owes what they owed, and still sat the Term 1 exams. If the system truly deleted them, your fee collection figures and your exam analysis would silently change for a term that is already closed. Keeping the record is what makes your historical reports trustworthy.

3.6 Bringing someone back

Students Manager › Transferred List.

Every removed learner is here. Re-admit them and they return to their class with their full history intact — the fees they owed, the marks they scored, all of it.

> **This is your undo button** — If you remove the wrong learner — and it happens, the trash icon is next to the edit icon — go straight here and re-admit. Nothing is lost. Tell your staff this, because the fear of the trash icon causes worse problems than the trash icon.

3.7 Class lists and alumni

Class List produces the register for a class or stream, filterable by gender and pathway, ready to print or export.

Alumni List is for learners who have completed rather than transferred out. Different from the Transferred List, and worth keeping properly — alumni records matter for reference letters years later.

3.8 Getting many learners in at once

At the start, typing 400 learners one at a time is not reasonable.

Import takes a spreadsheet. **Photos** takes a bulk photo upload.

> **Advice from experience** — Import one class first. Check it looks right — names in the correct columns, classes matching what you created in Settings, admission numbers formatted consistently. Then do the rest. Importing all 400 and finding every surname landed in the middle-name column is a bad afternoon.

3.9 Getting data back out

CSV for a spreadsheet. **PDF** for something to print or file. **KEMIS Export** for the government learner register — UPI, birth certificate numbers, parent IDs and special-needs codes in the format they expect.

Any table, anywhere in the system: filter it first, sort it, then export. The export gives you what is on screen, so the filtering is how you control what you get.

04

Attendance

4.1 Marking the register

Students Manager › Attendance Sheet. Choose the class and the date, mark, save.

Do it every morning. It takes two minutes and it is the difference between an attendance system and an attendance screen nobody fills in.

4.2 Reading it back

Attendance Report gives you patterns rather than a single day — who is chronically absent, which days of the week are worst.

Dashboard › Attendance Analytics goes further, including an attendance-against-performance comparison.

> **Why the head should look at this monthly** — Attendance falling is almost always the earliest visible sign that something is wrong at home, and it shows up long before the marks do. This is the one report that lets a school act early rather than explain later.

Staff attendance works the same way under **Staff Manager**.

05

Timetabling, properly

This is the part people find hardest, so we will go slowly. There are eight screens and they run in order. Doing them out of order is the single most common reason the generator produces nothing.

The order: Period Setup → Lesson Cards → Constraints → Generate → View → Edit. Relationships and Substitutions come after.

5.1 Period Setup — the shape of the day

Timetable › Period Setup. Three tabs: Periods, Rooms, Class Groups.

The Periods tab

Under **Quick Presets** you will find **7-Period Day**, **8-Period Day (KICD standard)**, and **Custom**. Click **Use This** on the one closest to your school. Review the slot list in the popup, then **Apply**.

> **Take care** — Applying a preset replaces your entire existing period schedule. Do this at the start, not after you have hand-tuned twenty rows.

Now adjust the **Period Schedule** table to match your actual day. For each row: the **Label**, **Start** and **End** times, the **Type**, and the **day buttons (Mon–Fri)** for which days it runs.

Type matters more than it looks:

- **lesson** — a teaching period. The generator schedules into these.
- **break**, **lunch**, **assembly** — non-teaching. The generator leaves them alone.

> **Why this is the important field** — If you mark your lunch hour as a lesson period, the generator will cheerfully timetable Mathematics into it. If you mark a genuine lesson period as a break, you have quietly lost a period from every class's week.

Add Period inserts a row; the trash icon removes one. Then **Save Changes**. Every period needs a valid start and end (end after start) and at least one day ticked, or the save is blocked.

The Rooms tab

Add Room for each teaching space: Room Name, Short Name, optionally Capacity, Building and Floor, and a Room Type. Leave **Active** ticked, click **Add Room**.

Then **Room Time-offs**: pick a room and click the cells in the period-by-day grid to mark when it is unavailable. **Save Time-offs**.

> **What this is really for** — The laboratory that the neighbouring school uses on Wednesday afternoons. The hall that becomes the exam room. Mark it unavailable here and the generator will never schedule into it — instead of you discovering the clash in week three.

The Class Groups tab

Only needed if you split classes. **Add Division**, name it, pick the Form and Stream, add the Groups with optional student counts, then **Add Division**.

This is how you handle a class that splits — half to French, half to Computer Studies, same period.

5.2 Lesson Cards — the teaching load

Timetable › Lesson Cards.

A lesson card is one sentence: *this teacher teaches this subject to this class, this many times a week.*

Create one for every combination. Yes, it takes a while. This is the raw material — the generator has nothing to work with until these exist.

> **Get the periods-per-week right** — This is where a subject silently ends up with four periods instead of five for a whole year. Sit with the curriculum allocation in front of you and enter it deliberately.

5.3 Constraints — the rules

Timetable › Constraints.

Teacher availability (the part-timer who is only in on Tuesdays and Thursdays), subject rules, spread requirements, doubles.

> **Be realistic** — Every constraint you add makes the puzzle harder. Add the ones that are genuinely true, generate, and see what you get. If you encode every preference as a hard rule, the generator will fail and you will not know which rule caused it. Start with the real constraints; add preferences afterwards.

5.4 Generate

Timetable › Generate.

Now the system does the work. It places every lesson card into the period grid, respecting your constraints, avoiding double-booking any teacher, class or room.

If it fails or leaves gaps, it is almost always one of three things:

1. **Over-constrained.** Too many hard rules. Relax the least important.
2. **Not enough periods.** More teaching required than the week holds. Check your lesson card totals against available lesson periods.
3. **A teacher is genuinely double-booked.** Two cards need the same person at once and no arrangement works.

> **Generating is not destructive to your setup** — Periods, cards and constraints survive. Generate, look, adjust, generate again. Do it as many times as you need.

5.5 View and Edit

View Timetable shows the result — by class, by teacher, by room. Print from here.

Edit Timetable lets you move individual lessons by hand. The generator gets you 95% of the way; the last 5% is your judgement about your own school.

> **Why editing by hand is fine** — No generator knows that the deputy needs Friday afternoon free for administration, or that a particular teacher travels from another campus. Move things. The system checks you are not creating a clash as you do.

5.6 Relationships and Substitutions

Relationships links cards that must move together — a double period that must stay contiguous, two cards that must be simultaneous.

Substitutions is for the everyday reality: a teacher is away and someone must cover. Record it here and the cover is on the record rather than in somebody's memory.

06

Exams and report cards

Six stages, in order.

6.1 Dean Settings and Exam Settings

Academic Manager › Dean Settings — the school's academic standards: grading scale, mark boundaries, how the school computes its results.

Academic Manager › Exam Settings — define the actual exams. CAT 1, CAT 2, End Term. What each is worth.

> **Do this before anyone enters a single mark** — Change the grading scale afterwards and every result already entered is reinterpreted. Agree it, set it, leave it alone for the year.

6.2 Subject Allocation

Academic Manager › Subject Allocation. Which teacher teaches which subject to which class.

This decides who can enter marks for what. A teacher who is not allocated a subject cannot enter marks for it — which is the point.

6.3 Set Marks and Record Marks

Set Marks opens the exam for entry and sets the deadline.

Record Marks is where teachers actually type. Each teacher sees only their own allocated subjects and classes.

Edit Marks corrects mistakes. **Marks Status** shows the Dean who has finished and who has not — which is how you chase the two teachers holding up 300 report cards.

6.4 Exam Analysis

Academic Manager › Exam Analysis.

Subject means, class means, teacher value-added, learners whose trend is declining. All of it computed from the marks already entered.

> **This is the real payoff** — It is not extra work — you entered the marks anyway. Everything here is free once the data is in, and it is the difference between having marks and understanding them.

6.5 Report Cards

Academic Manager › Report Cards. Generate for a class, review, print as PDF.

Spreadsheet gives you the full marksheet export for a class if you need the raw numbers.

Then send results to parents by SMS through **Communication › Send SMS**.

> **The whole point, in one sentence** — A teacher enters a mark once and it becomes a report card, an analysis, a trend line and a message to a parent's phone without anyone typing it a second time.

07

Fees

Set up once per term, then collect daily.

Almost everything here lives on one screen — **Finance › Fees / Invoicing** — across a row of tabs: **Voteheads**, **Gov Allocation**, **Set Fees & Invoice**, **Recurring Fees**, **Invoice per Student**, **Fees Adjustment**, **Close Term**. Work left to right the first time; that is the order they happen in.

Finance › Finance Settings is a different screen and holds only three things: **Bank Accounts**, **Ledger Accounts** and **Receipt Settings**. Do those first, once.

7.1 Setting up

Finance › Finance Settings first — add the school's bank accounts on the **Bank Accounts** tab (used when you record a bank payment), load your chart of accounts on **Ledger Accounts**, and set how printed receipts look on **Receipt Settings**.

Then **Finance › Fees / Invoicing**:

- **Voteheads tab** — your fee categories. Tuition, Boarding, Transport, Activity, Lunch.
- **Set Fees & Invoice tab** — the amount for each votehead, per class, per term. This is your billing template.

> **A trick worth knowing** — For anything only some learners pay — swimming, a club, a trip — put the votehead in the structure at **0**. Every learner gets the line at zero, and you then raise it only for those who actually pay it, on the Fees Adjustment tab. If you leave the votehead out entirely you cannot add it to that term later, so add it at zero and keep your options open.

7.2 Invoicing

Same screen, **Set Fees & Invoice** tab. Pick Term, Year and Form, then **Generate Invoices**.

Every learner in that class is billed from the structure. Use the **Invoice per Student** tab to open one learner's invoice and add a discount or a scholarship.

7.3 Taking money

Finance › Collect Fees. Search the learner, enter the amount, choose the mode (Cash / M-Pesa / Bank / Cheque), enter the reference, **Record Payment**, then **Print Receipt**.

The balance updates instantly. One payment can be split across voteheads.

> **On M-Pesa** — You can paste the entire confirmation message into the payment record, not just the code. Do it. When a parent phones in March insisting they paid in January, the full message with the amount, the date and the time settles it in seconds.

If the school has set up M-Pesa Daraja under **Settings › Integrations**, payments post automatically and the receipt is raised without anyone typing.

7.4 Adjusting

Fees / Invoicing › Fees Adjustment tab changes what individual learners owe for a votehead — a whole class listed at once, so you type amounts down the column.

Editing an already-invoiced amount is completely normal. A learner invoiced 5,000 who should pay 3,000 is changed here, and no, invoicing does not lock it.

7.5 Closing the term

Fees / Invoicing › Close Term tab carries unpaid balances into the next term as a brought-forward line, so arrears follow the learner instead of vanishing at the end of term.

7.6 Reports

Payment Reports — collections, who has paid, who has not. **Accounting Reports** — income and expenditure, votehead analysis, arrears ageing. **Dashboard › Financial Analytics** — the visual version, with collection rates per class and a defaulter list you can search.

08

Talking to parents

Communication › Send SMS. Choose recipients — a class, a list, everyone — write the message, send. **SMS History** is the record of what went out.

Send Email works the same way for longer things.

> **A word on SMS credits** — SMS costs money and the school buys credits. Check the balance before a big send. Under **Billing › SMS Top-up** you can buy more. Running out halfway through sending results to 400 parents is a bad afternoon.

09

The rest, briefly

None of this is required for the core to work. Switch each on when the school is ready.

Library — book stock, issue and return, stocktake, acquisitions. Outstanding loans show on the learner's profile.

Transport — routes and stop pricing, learner assignments, vehicles and fuel. Set transport as a votehead priced from the route and each learner is billed by the stop they actually use.

Payroll — settings, allowances, deductions, reliefs, then generate payslips. Kenyan PAYE, NHIF and NSSF are built in.

Inventory and Kitchen — purchase orders, receiving, stock, and the kitchen: requisitions on Form S11, recipes, menus, and what feeding a child for a day actually costs.

Pocket Money — boarders' money held by the school, deposits and withdrawals.

10

Keeping it healthy

10.1 Backups

Settings › Database Backup. Automatic nightly backups run on their own. Check occasionally that they are there.

10.2 The audit trail

Settings › System Audit. Every significant action, with who did it and when. Searchable.

> **What this is for** — Not surveillance. It is for the day someone asks "who changed this learner's fees?" and you can answer in thirty seconds rather than guessing.

10.3 When something looks wrong

Work through these in order. It is almost always one of them.

WHAT YOU SEE	WHAT IT USUALLY IS
A screen with no data	Something earlier in the flow has not been done
A learner missing from a list	Check your filters, then check the Transferred List
Cannot enter marks	The subject is not allocated to you
A menu is not there	Your role does not include it
Wrong balance	Check whether the term was closed and arrears carried
Change did not stick	No green toast means it did not save. Try again
Timetable will not generate	Over-constrained, or more teaching than periods

If none of it fits: WhatsApp **+254 702 683 707** / **+254 715 694 916**, or **support@elimikasasa.co.ke**.

11

The first month, as a plan

Week 1. School profile. Classes and streams. Staff. Logins and roles. Import learners and check the first class carefully.

Week 2. Voteheads, fee structure, invoice the term. Exam settings and grading. Subject allocation. Start attendance every morning.

Week 3. Collect fees on the system rather than in a book. Teachers begin entering marks as they mark. Build the timetable: Period Setup, Lesson Cards, Constraints, Generate.

Week 4 and onward. Attendance daily. Fees as they come. Marks as they are marked.

End of term. Report cards. Analysis. Results to parents by SMS. Collection reports. Close the term so arrears carry.

One last thing

The system pays you back in proportion to how consistently it is fed.

A school that marks attendance every morning gets early warning about learners in trouble. A school that marks it in bursts gets a chart with holes. A school that receipts every payment on the system gets a fee position that is right at any moment. A school that receipts some payments in a book gets two sets of numbers and an argument.

None of this is about the software. It is the same discipline a good school office has always had. The system just means it only has to be done once.

Elimikasasa — built in Kenya, for Kenyan schools. Full screen-by-screen reference: the Help page inside the system, or elimikasasa.co.ke/user-guide