



SchoolDesk

Step-by-step school management user guide

Run your school confidently—online or offline

This manual guides owners, head teachers, teachers, and finance officers through setup, daily work, reporting, secure cloud synchronization, backups, and recovery.

Live system: schooldesk-jet.vercel.app

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Recommended first session: Use the Owner/Admin account on the main office computer. Complete School Setup, create the cloud workspace, upload the first cloud copy, then invite staff.

Five-minute quick start

- 1 Open **schooldesk-jet.vercel.app** in Chrome or Edge.
- 2 Open **School Setup** and enter the school profile, classes, streams, subjects, terms, exam weighting, and academic year.
- 3 Open **Premium Lock** → **Secure cloud sync**, create the owner account, confirm the email, and sign in.
- 4 If asked, select **Create a new school workspace**, then select **Upload this device to cloud**.
- 5 Export a JSON backup and store it on a separate flash drive or secure cloud folder.

1. Roles and responsibilities

Role	Recommended user	Cloud permissions
Owner/Admin	Proprietor or trusted system administrator	Full school setup, records, academics, finance, staff invitations, backups, and administration.
Head Teacher	Head teacher or deputy	Full operational access and permission to invite staff.
Teacher	Class or subject teacher	Marks, attendance, activities, academic analysis, progress, reports, and messages.
Finance Officer	Bursar, accountant, or finance clerk	Fees, fee structures, payments, expenses, financial reports, and messages.

Important: Every person should use their own account. Do not share the owner password. Invitation codes are single-use and expire after seven days.

2. First-time school setup

- 1 Select **School Setup**.
- 2 Enter the official school name, postal address, phone number, and motto; select **Save school profile**.
- 3 Choose a theme and upload the logo, school stamp, class-teacher signature, and head-teacher signature.
- 4 Add every official class or grade, then add streams such as Blue, Green, North, or South.
- 5 Add all learning areas/subjects and the academic terms used by the school.
- 6 Set the current academic year and choose whether yearly auto-promotion is enabled.
- 7 Under **Flexible exam setup**, add every exam with its name, default maximum marks, and optional Combined Term weight.

Exam examples: For a single exam marked out of 60, set maximum to 60 and weight to 100. SchoolDesk converts 45/60 to 75%. For Mid Term 40% and End Term 60%, add both exams with weights 40 and 60. For three assessments, use any relative weights; SchoolDesk normalizes them automatically.

Good practice: Agree on exact class, stream, subject, and term names before entering learner data. Consistent naming keeps reports and analysis clean.

3. Create and connect the owner account

- 1 Open **Premium Lock**, then locate **Secure cloud sync**.
- 2 Enter the owner's email and a strong password of at least eight characters.
- 3 Select **Create owner account**. If email confirmation is enabled, open the Supabase message and confirm the address.
- 4 Return to SchoolDesk and select **Sign in**.
- 5 Select **Create a new school workspace** if the account is not yet linked.
- 6 Select **Upload this device to cloud** to create cloud version 1.

First-sync safety: "Upload this device" sends the current device's records to the cloud. "Download cloud" replaces the device copy. Export a backup before downloading when the device already contains records.

Understanding cloud status

- **Cloud saved · version N:** the current device successfully stored a new revision.
- **Newer cloud records exist:** another device saved first. Export a backup, then download the newer cloud copy.
- **Offline · saved locally:** work can continue; linked changes synchronize when internet returns.
- **Session expired:** sign in again. Local records remain safe.

4. Invite and connect staff

Owner or Head Teacher

- 1 Sign in and open **Premium Lock** → **Secure cloud sync**.
- 2 Choose Teacher, Finance Officer, or Head Teacher under **Invite a staff member**.
- 3 Select **Generate invitation code**.
- 4 Send the code privately to the intended staff member. Never post codes publicly.

Staff member

- 1 Create and confirm a personal SchoolDesk account, then sign in.
- 2 Enter the invitation code and select **Join school**.
- 3 SchoolDesk downloads the school's cloud records and shows only the modules allowed for that role.

5. Admissions and learner records

Admit one learner

- 1 Open **Admissions**.
- 2 Enter the learner's name, admission number, NEMIS/UPI, date of birth, gender, birth certificate number, class, and stream.
- 3 Enter guardian names, relationship, identity number, phone numbers, residence, previous school, religion, and medical notes where applicable.
- 4 Select the admission button, then confirm the learner appears in the register.

Import learners from Excel

- 1 Download the learner template.
- 2 Fill it in without changing the column headings.
- 3 Save/export the spreadsheet as CSV.
- 4 Select the CSV file, choose default class/stream if needed, and select **Import learners**.
- 5 Filter the register and inspect several imported learners before continuing.

Protect personal data: Record only information the school is authorized to hold. Limit account access, keep devices locked, and never send exported backups through unsecured public channels.

6. Marks and academic analysis

Subject entry

- 1 Open **Marks**.
- 2 Select learner, term, configured exam type, learning area, paper, score, and maximum score.
- 3 Save. SchoolDesk calculates the percentage automatically regardless of whether the exam is out of 20, 40, 60, 80, 100, or another maximum.

Class marksheet

- 1 Select class, stream, term, and exam type.
- 2 Enter scores across the learner rows and subject columns.
- 3 Review totals and averages, then save the marksheet.
- 4 Open **Academics Analysis** and **Merit Lists** to review class, subject, learner, ranking, and support information.

7. Fees and expenses

Set the fee structure

- 1 Sign in as Owner, Head Teacher, or Finance Officer.
- 2 Open **Fees**.
- 3 Select class and term, enter the official amount, and save.

Record a payment

- 1 Search for and select the learner.
- 2 Select the term and enter the invoice/payment information.
- 3 Save and confirm paid amount and balance.
- 4 Open the learner ledger to print a receipt or fee statement.

Record expenses

- 1 Open **Expenses**.
- 2 Create the required vote heads.
- 3 Enter expense item, category, amount, supplier, and notes.
- 4 Save, then review income-versus-spending analysis.

Daily finance routine: Reconcile SchoolDesk against cash, bank, and M-Pesa records. Export a backup after completing a large batch of payments.

8. Attendance and activities

Attendance

- 1 Open **Attendance**.
- 2 Select date, class, and stream.
- 3 Mark every learner Present, Absent, Late, or Excused as provided.
- 4 Save before moving to another class.

Activities

- 1 Open **Activities**.
- 2 Select learner, activity, category, term, level, performance, and teacher comment.
- 3 Save and confirm it appears in activity history.

9. Reports and communication

Individual report card

- 1 Open **Report Cards**.
- 2 Select learner, term, and exam type.
- 3 Review grades, totals, comments, activities, attendance, signatures, logo, and stamp.
- 4 Use the browser print command and select the correct paper size and printer.

Class report cards

- 1 Select class, stream, term, and exam type.
- 2 Select **Print class reports**.
- 3 Review the print preview before committing paper.

Messages

- 1 Open **Messages**.
- 2 Select the class or target group and message purpose.
- 3 Generate the message drafts.
- 4 Review names, balances, marks, phone numbers, and wording before copying to SMS or WhatsApp.

Communication control: SchoolDesk prepares drafts; a responsible staff member must verify recipients and content before sending.

10. Promotion and learner archives

- 1 Open **Admin Tools**.
- 2 For yearly transition, first preview proposed promotions and inspect the from/to classes.
- 3 Approve only after the head teacher confirms the list.
- 4 Use manual class promotion when needed.
- 5 Archive learners who transferred, graduated, or left school; do not delete historical academic or finance records.

11. Working offline

- 1 While online, open SchoolDesk and use **Install app** when offered.
- 2 Open **Premium Lock** → **Offline readiness** and select **Protect offline data**.
- 3 Test offline mode before relying on it: disconnect internet, reopen the installed app, and inspect a learner record.
- 4 Continue normal work. The top status shows **Offline · saved locally**.
- 5 Reconnect. Linked changes synchronize automatically; confirm a cloud version message appears.

Offline rule: Avoid editing the same records on several offline devices at the same time. Revision protection prevents silent overwrites, but staff may need to reconcile conflicting changes manually.

12. Backup, restore, and recovery

Export a backup

- 1 Open **School Setup** → **Data backup and restore**.
- 2 Select **Export backup**.
- 3 Store one copy away from the computer—preferably encrypted.
- 4 Name folders by date and retain weekly/monthly copies according to school policy.

Restore a backup

- 1 Export the current device first, even if it appears damaged.
- 2 Select the trusted SchoolDesk JSON file.
- 3 Select **Restore backup**.
- 4 Inspect learner totals, recent marks, balances, and school profile before uploading to cloud.

Do not restore casually: restoring replaces the device copy. Uploading afterward can create a new cloud version. Confirm the intended recovery point with school leadership.

13. Troubleshooting

Problem	What to do
Cloud configuration unavailable	Confirm internet access and reload. Local work remains available.
Email login fails	Confirm the email address, password, and email verification. Try signing in again.
Invitation rejected	Codes are single-use and expire after seven days. Ask the owner/head teacher for a new code.
Newer cloud records exist	Export a local backup, download the cloud copy, then re-enter any legitimate unsynchronized work.
App does not work offline	Open it online once, install it, and ensure offline protection is enabled. Do not use private/incognito mode.
Save reports device storage is full	Export a backup, remove unnecessarily large branding images, and free device storage.
Wrong modules are visible	Sign out and sign in with the correct personal account. The cloud role controls access.
Printed report layout is wrong	Use A4 paper, default scale, normal margins, and disable unnecessary browser headers/footers.

When requesting technical support

- State the user role and module.
- Write the exact error message and time.
- State whether the device was online or offline.
- Do not send passwords, secret keys, or full learner backups unless a formally authorized secure channel is provided.

14. Launch-day checklist

- ☐ School profile, logo, signatures, and stamp verified.
- ☐ Classes, streams, subjects, terms, academic year, and exam weighting verified.
- ☐ Learner admission numbers checked for duplicates.
- ☐ Fee structures approved by school leadership.
- ☐ Owner cloud workspace uploaded and cloud version displayed.
- ☐ Head Teacher, Teacher, and Finance accounts tested.
- ☐ Offline reopening tested on the main office computer.
- ☐ First JSON backup stored separately.
- ☐ One sample receipt and report card printed.
- ☐ Staff briefed on privacy, personal accounts, and conflict messages.

SchoolDesk is an operational record system. Schools remain responsible for data accuracy, authorized access, statutory retention, privacy compliance, financial reconciliation, and appropriate safeguarding of learner information.