

CIVICA



CES 2.2 End of Year Procedure 2022

October 2022

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1. Overview

This document is designed as a guide for the End of the Year procedure in CES.

As part of the End of Year procedure, the Advance Academic Year (AAY) process needs to be run. This process creates the enrolment details records for students for the next calendar year.

The AAY process can be partially run on multiple occasions before the end of the current year in order to plan for the next academic year in terms of Roll Groups, Timetabling and Billing, however this document focusses on running the process after the last day of term.

This document covers the scenario where the AAY process is run

- After the last day of term 4 of 2022

For Finance, End of the Year processes can be completed when all processing for the year is complete.

Steps and processes included in this document are:

- School Admin
 - Preparation tasks to complete before running the AAY process
 - Running the Advance Academic Year (AAY) process
 - Post AAY tasks
 - Tasks for the new year
- Finance End of the Year
 - New year setup
 - Processing and End of Month
 - EOY process
- Billing End of Year
 - Debtor Account Deactivation

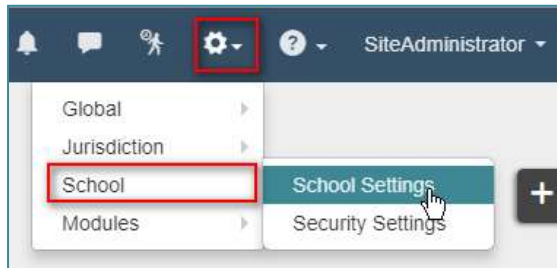
2. Preparation for End of Year in School Admin

These preparation tasks can be done prior to the end of term 4.

2.1. Check Academic Years Table

Confirm that the School Academic Years table is configured correctly for your school.

- From the top Toolbar select Settings | School | School Settings



- Click **Academic Year** from the left menu and confirm the correct **Exit Year** is selected in the table (this may Year 6 for Primary Schools or Year 12 for Secondary or K-12 Schools for example).

| School Academic Years | | | | | | |
|-----------------------|-------------|------------|--------------------------|--------------------------|--------------------|---------------------|
| Year Level | School Code | Sort Order | Active | Exit Year | Next Academic Year | Next Enrolment Type |
| 3YO Kindergarten | K3 | 0 | <input type="checkbox"/> | <input type="checkbox"/> | Pre-School | Part-time |
| Pre-School | PRE | 1 | <input type="checkbox"/> | <input type="checkbox"/> | Prep | Full-time |
| Prep | REC | 2 | <input type="checkbox"/> | <input type="checkbox"/> | Year 01 | Full-time |
| Year 01 | 01 | 3 | <input type="checkbox"/> | <input type="checkbox"/> | Year 02 | Full-time |
| Year 02 | 02 | 4 | <input type="checkbox"/> | <input type="checkbox"/> | Year 03 | Full-time |
| Year 03 | 03 | 5 | <input type="checkbox"/> | <input type="checkbox"/> | Year 04 | Full-time |
| Year 04 | 04 | 6 | <input type="checkbox"/> | <input type="checkbox"/> | Year 05 | Full-time |
| Year 05 | 05 | 7 | <input type="checkbox"/> | <input type="checkbox"/> | Year 06 | Full-time |
| Year 06 | 06 | 8 | <input type="checkbox"/> | <input type="checkbox"/> | Year 07 | Full-time |
| Year 07 | 07 | 9 | <input type="checkbox"/> | <input type="checkbox"/> | Year 08 | Full-time |
| Year 08 | 08 | 10 | <input type="checkbox"/> | <input type="checkbox"/> | Year 09 | Full-time |
| Year 09 | 09 | 11 | <input type="checkbox"/> | <input type="checkbox"/> | Year 10 | Full-time |
| Year 10 | 10 | 12 | <input type="checkbox"/> | <input type="checkbox"/> | Year 11 | Full-time |
| Year 11 | 11 | 13 | <input type="checkbox"/> | <input type="checkbox"/> | Year 12 | Full-time |
| Year 12 | 12 | 14 | <input type="checkbox"/> | <input type="checkbox"/> | | |

- Confirm that the **Next Academic Year** is correct for each year and that the **Next Enrolment Type** is selected i.e., Pre-School students may be changing from Part-time status to Full-time status for the next academic year.

Note: If there are multiple year groups within an Academic Year, for example a Kindergarten year level that contains 3yr old students and 4 yr old students, the 3yr old students may need to be flagged as 'Repeating' students to ensure that their academic year level does not increment after the AAY process is run. See 'Flag Repeating Students'.

2.2. Check Current Calendar Setting

Before running the AAY process the current calendar setting needs to be verified as correct.

Note: It is important that the current calendar is set to the current school year that is ending, before the Advance Academic Year task is run.

If a future calendar year is selected as a Current Calendar Year before the task is run, all student enrolment records will be in the wrong year.

The current calendar is viewed by navigating to **Settings | School | School Settings** and then selecting **School Calendar**.

The current year is indicated by a tick next to current calendar field.

School Calendar

Year: 2022-2022

Year From: 1/01/2022

Year To: 31/12/2022

Current Calendar :

2.3. Check Next School Calendar Year

The School Calendar for each year is only available once it has been set up by Jurisdiction at the Global Calendar level and then published to schools. Only users with 'Jurisdiction' access flagged against their permissions in 'Security Settings' will have access to the Global Calendar.

As the AAY process needs to extract date information for the next school calendar year, this information must be available prior to running the process.

Click on the drop-down arrow in the Year field and click on 2023 to review the next calendar year settings.

Note: Only CHECK that the next year is there – DO NOT select it as the ‘Current Calendar’ at this point.

The screenshot shows the 'School Calendar' interface. It has two dropdown menus: 'Year' and 'Year From'. The 'Year' dropdown is currently set to '2022-2022'. The 'Year From' dropdown is open, showing a list of years: '- Select -', '2023-2023' (highlighted with a red box), '2022-2022', '2021-2021', and '2020-2020'. Below the dropdowns is a button labeled 'Teaching Terms' with a downward arrow.

See **Appendix** at the end of this document for information relating to the Jurisdiction set up of the Global Calendar.

2.4. Review Exiting Students

Graduates:

All students in the final year at your school (Graduating students) will be given an **Exit Date** and can be made '**Historical**' as part of the AAY process, so this information does not need to be manually entered on to their records.

If a Destination School is required, this needs to be entered separately either individually via a student's record, or in bulk using the Quick Edit functionality. **This cannot be done until students have an Exit Date and Reason for Leaving entered.**

(Entering a Destination school allows the **Transferring Students** process to be completed. See Online Help for further details).

Non-Graduates:

Any students who will be leaving your school before, or at the end of this year **who are not graduating**, should have an 'Exit Date' entered on their record. This is so that new enrolment detail records are not created for them in the new calendar year.

Notes: If the student is currently 'Passive', then their passive record will be end dated during the AAY Process and a new Passive record started for the 2023 year. If this is not what the school requires, each student should be assessed and updated prior to running the AAY Process. See Online Help for further details regarding the CES passive feature.

If new enrolment detail records are created for a student in the new year in error, this can be rectified using the No Show functionality.

To enter an Exit Date for students who are leaving (required for non-graduates only):

- Locate the required Student Information page and select the **Enrolment** section of the record

- Click **Edit**.
- Enter the mandatory fields of **Exit Date** (can only be from today onwards) and **Reason for Leaving**. Destination school can be entered at this point if known.
- If the Exit Date is for today, change the Status from 'Current' to '**Historical**'.

- Click **Save**

Notes: Exit Date can only be added via the Enrolment section for dates *from today or in the future*.

To enter an Exit Date for a student which is *in the past*, the 'No Show' functionality would have to be used. This allows the system to remove any unmarked or unexplained absence attendance records that were created for the student after this past date. See Online Help for further details.

Student status can only be marked as 'Historical' when entering an Exit Date for the current day, or subsequently once the Exit Date has passed.

Attendance records cease to be built for a student once an Exit Date (or last day of term if sooner) has passed, irrespective of whether the student status is Current or Historical.

2.5. Repeating Students

2.5.1. Review Existing Repeating Students

For Students who are repeating their academic year this year (2022) and not repeating their current academic year next year, the repeating field in their student record needs to be updated. This is so that when the AAY process is run, enrolment details are created for them in the new year with their Academic Year incrementing.

- Navigate to School Admin > Students > Student Find
- Under Current Enrolment section, select **Yes** in the **Repeat** field and click **Find**

The screenshot shows the 'Student Find' interface. Under the 'Current Enrolment' section, there are several input fields: Student ID, Date of Entry Between (with calendar icons), Academic Year of Entry, Roll Group, Campus, House, Academic Year, Status (with a 'Consult' button), and a 'Repeat' dropdown menu. The 'Repeat' dropdown is currently set to 'No' and is highlighted with a red box. A 'Find' button is visible in the top right corner.

If there are no current students flagged as repeating, the following message will display on the Search Results screen.

The screenshot shows a message box with a grey header containing the text 'Student Find'. Below the header, a yellow box contains the text: 'No results found for the entered search criteria.'

- If a list is returned, select students individually (Hint: use the <Ctrl> key on your keyboard or click **Select All** to select the students

| Surname | First Name | Middle Name | Preferred Name | Preferred Surname | Student ID | Date of Birth | Gender | Academic Year | Roll Group | Enrolment Type | Date of Entry |
|---------|------------|-------------|----------------|-------------------|------------|---------------|--------|---------------|------------|----------------|---------------|
| Cullen | David | | | | 2021201876 | 22/11/2018 | M | 05 | Y5A | Full-time | 2023/2024 |
| Nathan | Alex | | | | 2020123 | 18/09/2009 | M | 05 | Y5A | Full-time | 09/09/2020 |

- Click View Selected
- Under the Current Enrolment section, click the **Edit** button
- Click on the **Repeat** checkbox to untick

Current Enrolment

Student ID:

ID Card Expiry Date:

Previous Student ID:

House:

Roll Group:

Campus:

Academic Year:

Repeat:

Photo:

- Click **Save** in the Enrolment section
- Click on the **Next Record** button and repeat for any further students



Notes: If multiple students are no longer repeating, this data entry can also be done via the Quick Edit functionality. See Online Help for further details.

2.5.2. Flag Repeating Students

Students who will be repeating their current academic year need to be flagged as such on their student record. This is so that when the AAY process is run, enrolment details records are created for them in the new year, but their Academic Year is not incremented (For example 3yr old KINDY students remaining in KINDY in the new year).

- Navigate to the required Student Information record
- Under the Current Enrolment section, click **Edit** button
- Click on **Repeat** checkbox

The screenshot shows the student record for Georgeo Johnson (KINDY, KGJ) at Carter Primary School. The 'Current Enrolment' section is expanded, showing fields for Student ID, ID Card Expiry Date, Previous Student ID, House, Roll Group (KGJ), Campus (Carter Primary School), and Academic Year (KINDY). The 'Repeat' checkbox is checked and highlighted with a red box. Other fields include Photo (Change) and Publish Photo (checkbox).

- Click **Save** in the Enrolment section
- Repeat for any further students

Notes: If multiple students are repeating, this data entry can also be done via the Quick Edit functionality. See Online Help for further details.

When the AAY process is run the Repeat flag setting on the student's current enrolment detail record will be copied to their future enrolment detail record. The Repeat flag on the future record does not need to be reviewed/updated until the end of year procedure for 2023.

2.6. Transfer Future Students (Optional)

If you have not already done so, it is recommended to run the Transfer Future Students process before the AAY. This allows you to create enrolment records for any **Future Students** that are due to attend the school in the new year, with a status of 'Expected'.

As part of the AAY process the 'Expected' students' status can be updated to 'Current'.

Note: If preferred, the Transfer of Future students can be done separately in the new year.

To Transfer Future Students (see Online Help for a more detailed description):

- Select menu item Transfer & Roll-over
- Select Transfer Future Students
- Select the appropriate **Calendar Year** from the drop-down menu
- Select the appropriate **Application Status** required for example 'Confirmed' or 'Accepted' (Note: This Application Status can be updated for students via their Entry Details or in bulk for multiple students through Quick Edit)
- Add the **Entry Date** column to the grid if required to aid correct selection of students in step below

The Valid to Transfer column will display whether students from the list can be transferred or not. A message displays in this column where the data is incomplete. At the processing stage, a Warning will also display. These records can be edited from this page by using <Ctrl> click and opening them in a new tab. Once the editing process is complete, refresh the Transfer Future Students page.

| Surname | First Name | Entry Type | Entry Date | Campus | Academic Year | Region | Current Status | Valid to Transfer |
|----------|------------|------------|------------|---------------------------|---------------|-------------|----------------|---|
| Jones | Mat | I | 30/9/2023 | 31 Flanders Street School | 02 | Agriculture | 0 | Information Status value has not been provided. |
| Williams | Mat | I | 30/9/2023 | 31 Flanders Street School | 02 | | 0 | Information Status value has not been provided. |
| Wright | Sarah | I | 30/9/2023 | 31 Flanders Street School | REC | | 2 | Yes |

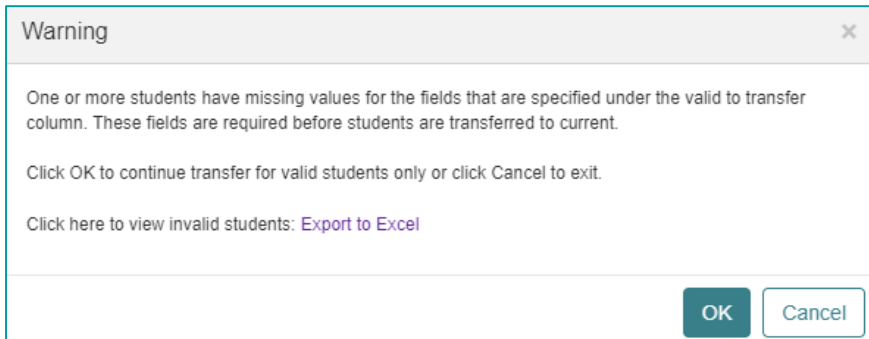
- Select (highlight row) students individually (Hint: use the <Ctrl> key on your keyboard) or click **Select All** to select the students to transfer

| Surname | First Name | Entry Type | Campus | Academic Year | Region | Current Status | Valid to Transfer |
|----------|------------|------------|---------------------------|---------------|-------------|----------------|-------------------|
| Jones | Mat | I | 31 Flanders Street School | 02 | Agriculture | 0 | Yes |
| Williams | Mat | I | 31 Flanders Street School | 02 | | 0 | Yes |
| Wright | Sarah | I | 31 Flanders Street School | REC | | 2 | Yes |

Note: The transfer of Future Students where their Enrolment Type is due to be Part-time, should be done as a separate batch to other students who will have Full-time enrolment type.

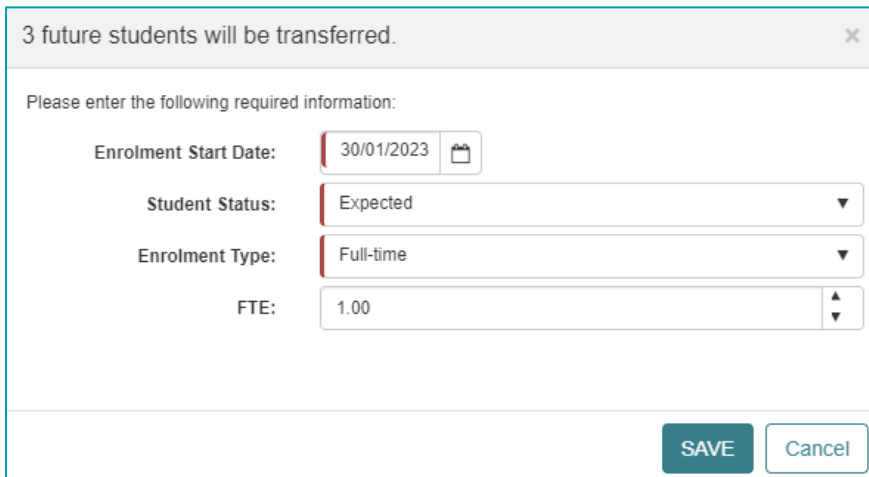
- Click **Process**

Note: If students are missing data required to process their record, a Warning will display. A list of Students with invalid data can be exported to Excel from the link in the message.



A warning dialog box titled "Warning" with a close button (X) in the top right corner. The text inside reads: "One or more students have missing values for the fields that are specified under the valid to transfer column. These fields are required before students are transferred to current. Click OK to continue transfer for valid students only or click Cancel to exit. Click here to view invalid students: [Export to Excel](#)". At the bottom right, there are two buttons: "OK" and "Cancel".

- Enter the **Enrolment Start Date** as the first day of school in the new year. (Attendance records will start to build from this date).
- Select **Expected** from the dropdown for **Student Status**
- Select an Enrolment Type and an FTE



A dialog box titled "3 future students will be transferred." with a close button (X) in the top right corner. The text inside reads: "Please enter the following required information:". Below this, there are four input fields: "Enrolment Start Date:" with a date picker showing "30/01/2023" and a calendar icon; "Student Status:" with a dropdown menu showing "Expected"; "Enrolment Type:" with a dropdown menu showing "Full-time"; and "FTE:" with a spinner box showing "1.00". At the bottom right, there are two buttons: "SAVE" and "Cancel".

Note: All transferring students in this batch will be given the same details as entered in the above screen. If groups of students have different Enrolment Types and/or FTE values, they should be processed in batches.

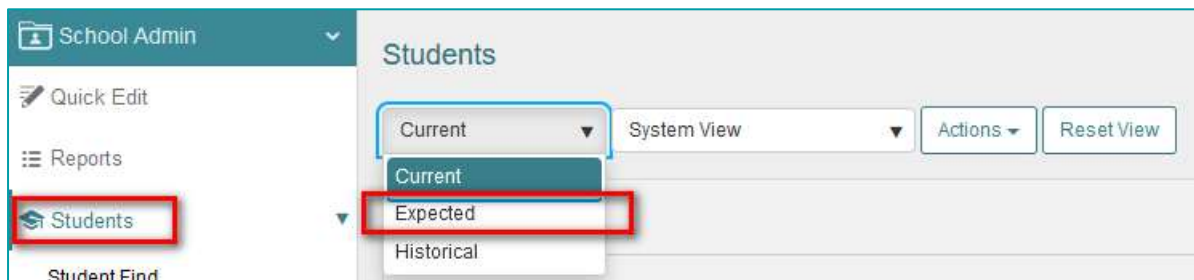
- Click **SAVE**

2.7. Review Existing Expected Students

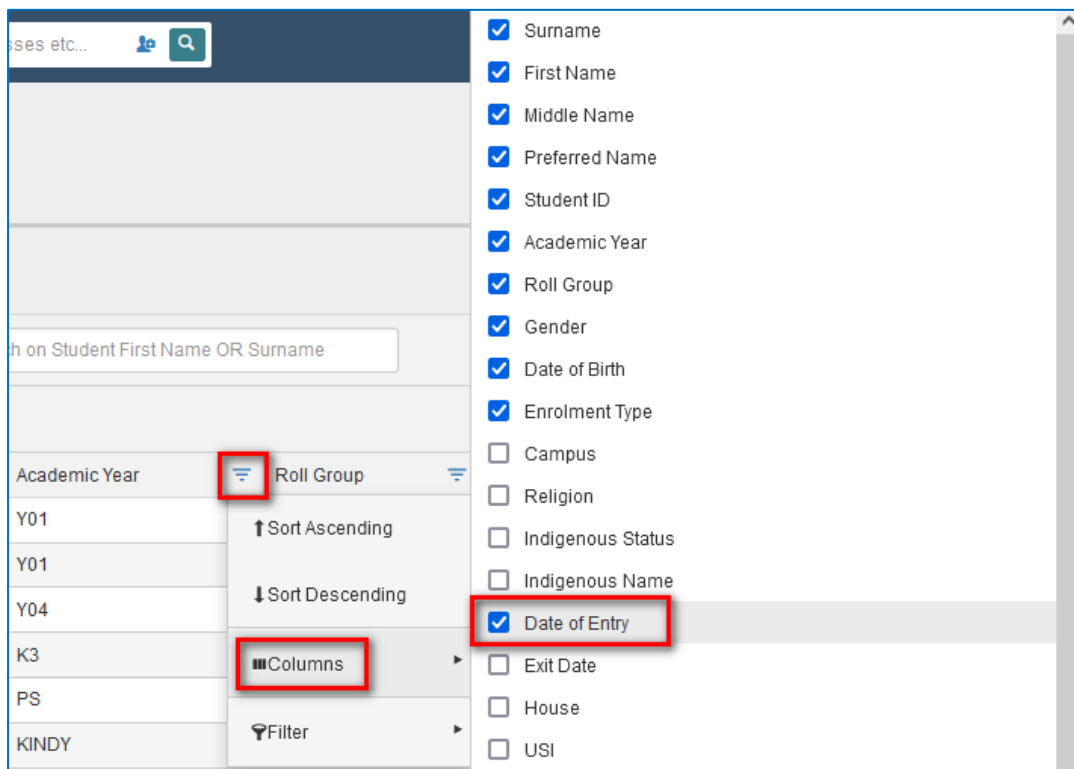
Students who have status of 'Expected' that did not show up at the school, need to be removed or their entry date moved to later date. For these students, the 'No Show' functionality would have to be used.

To find a list of students with a status of 'Expected':

- Navigate to School Admin > Students
- On the Students landing page, click on the 'Current' drop-down box and select 'Expected'



- Click on one of the column chevron arrows and select Date of Entry to display this column on the grid



- Review the list
- Click on Surname hyperlink for student that has status of 'Expected' and 'Date of Entry' with past date or in year 2022

| Surname | First Name | Student ID | Academic Year | Roll Group | Gender | Date of Birth | Enrolment Type | Date of Entry |
|---------|------------|-------------|---------------|------------|--------|---------------|----------------|---------------|
| Kale | Marion | 20212021028 | ES | 85A | F | 20/06/2009 | Full-time | 25/06/2022 |
| Sara | Mel | 20212021118 | T2 | | M | 01/12/2002 | Full-time | 31/08/2022 |
| Watson | Sarah | 20212021116 | PRE | 89A | F | 20/10/2015 | Full-time | 06/07/2022 |

- Select Actions>No Show and choose whether to 'Remove the Student Enrolment' or 'Move the student start date to a later date'

Student No Show

Options → Process → Confirmation

Set as No Show: Marion Kale

Existing Enrolment Start Date: 22/08/2022

Existing Enrolment End Date:

Do you want to:

- Move the student start date to a later date?
- Move the student end date to an earlier date?
- Remove the student enrolment?

Next Cancel

Notes: It is very important to update students with status of 'Expected' and 'Date of Entry' of past date or in year 2022 via 'No Show' functionality before running AAY process.

There are Business Rules attached to the No Show process so some details (including any attendance records other than Unexplained or Unmarked), may need to be updated.

Advance Academic Year Process

The Advance Academic Year process will:

- Create enrolment detail records for the next school calendar year, for students continuing at the school in that new year.
- Give all graduating students an Exit Date, with the option to change their status to 'Historical'.
- Advance the academic year for 'External' students.
- Change 'Expected' status students with 'Date of Entry' in the next school calendar year to be 'Current' if required.
- Advance roll groups if required.

Note: It is important that steps '2.2 Check Current Calendar Setting' and '2.3 Check Next School Calendar Year' have been completed before proceeding with this process.

2.8. Running the Advance Academic Year

1. Select menu item Transfer & Roll-over
2. Select Advance Academic Year
3. The Academic Years table will display. The settings displayed here should be correct after following Step 2.1 of this document. If they are not correct, they can be edited at this point.

| Current Academic Year | Next Academic Year | Next Enrolment Type |
|-----------------------|--------------------|---------------------|
| 00C | PRE | Part-time |
| PRE | REC | Full-time |
| REC | 01 | Full-time |
| 01 | 02 | Full-time |
| 02 | 03 | Full-time |
| 03 | 04 | Full-time |
| 04 | 05 | Full-time |
| 05 | 06 | Full-time |
| 06 | 07 | Full-time |
| 07 | | |

Advance Academic Year options

| | |
|---|---|
| Exit date for the graduates: | <input type="text" value=""/> |
| End date for the current school year: | <input type="text" value="16/12/2022"/> |
| Start date for the next school year: | <input type="text" value="30/01/2023"/> |
| Should all 'Expected' students for 2023 become 'Current'? | <input type="text" value="-Select-"/> |
| Should all graduates become 'Historical'? | <input type="text" value="No"/> |
| Advance Roll Groups? | <input type="text" value="-Select-"/> |
| Recalculate Student Order in Billing? | <input type="text" value="No"/> |

4. Exit date for the graduates:

Enter the date that graduates will be leaving. This could be the end of term date but may be an earlier date.

Notes: On the Student Information Page, the 'Exit Date' and 'Reason for leaving' (graduated) will be updated after the AAY process. Only final year students *without a pre existing Exit Date* will be updated.

If an exit date already exists on a final year Student's record (the date has been manually entered) this will not be overwritten.

5. End date for the current school year and Start date for the next school year:

These fields are automatically populated from the term dates according to the current and new calendar years (See steps 2.2 and 2.3 of this document).

6. Should all 'Expected' students for 2023 become 'Current':

- If **Yes** is selected, students with a status of 'Expected' and 'Date of Entry' in year 2023 will have their status updated to 'Current'.
- If **No** is selected, students will retain the status of 'Expected' in the new year. These students will need to have their status changed manually to 'Current' in the new year. This can be done on an individual basis or in bulk using the Quick Edit function.

7. Should all graduates become 'Historical':

This option will only be available for selection if the Exit Date entered for the graduates is a date in the past.

As this process is being run after the last day of Term 4, select **Yes**.

Once the process has run, the status displayed on the Student Information page will update from 'Current' to 'Historical'.

Note: Once students have a status of 'Historical' they can no longer be billed in Billing. If a Historical student still has outstanding debts attached, any follow up would need to be processed in the school's finance application.

8. Advance Roll Groups:

Yes should only be selected where ALL students in each Roll Group will advance to the same new Roll Group. Where students will be re-organised across different new Roll Groups, **No** should be selected.

Note: If 'No' to Advance Roll Groups is selected, students can be assigned in bulk to new Roll Groups at a later date by using the 'Assign to Roll Group' function available on the Students landing page 'Future Year 2023-2023' tab.

This tab is only visible after the AAY has been run. Once the new calendar year of 2023 is set as the 'Current' calendar year, this tab is then no longer visible. Assigning Roll Groups would then need to be done through Quick Edit. Or through individual student records.

(See Assigning Roll Groups in Online Help for further information).

- a. If **Yes** is selected, the Current and Next Roll Group table will display. 'Next Roll Group' information may already be displayed here if the 'Roll Groups' data reference table in School Admin has been preconfigured.

| Edit Roll Groups? | |
|-----------------------------------|-----------------|
| Current Roll Group | Next Roll Group |
| 01.1 | 02.1 |
| 02.1 | 03.1 |
| 03.1 | 04.1 |
| 04.1 | 05.1 |
| 05.1 | 06.1 |
| 06.1 | |
| 07.1 | |
| 08.1 | |
| 08.2 | |
| 08.3 | |
| 08.4 | |

- b. If any of the 'Next Roll Group' information is blank or incorrect, click **Edit Roll Groups** button

| Name | Descripti... | Room | Staff | Alternate Staff | Next Roll Group | Exit Roll Group | Active | Locked | | |
|------|-----------------|-------|-----------------|-----------------|-----------------|--------------------------|-------------------------------------|--------------------------|--|--|
| 01.1 | Roll Group 01.1 | | Zandra Abbotson | | 02.1 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | |
| 02.1 | Roll Group 02.1 | | Ban Cella | | 03.1 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | |
| 03.1 | Roll Group 03.1 | | Lesle Ogbourne | | 04.1 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | |
| 04.1 | Roll Group 04.1 | | Erek Collier | | 05.1 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | |
| 05.1 | Roll Group 05.1 | | Zandra Abbotson | | 06.1 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | |
| 06.1 | Roll Group 06.1 | | Reuben Pugsley | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | |
| 07.1 | Roll Group 07.1 | | Neil Lyddiatt | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | |
| 07.2 | Roll Group 07.2 | Room1 | Hinal Sharma | Tasia Dallwater | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | |
| 08.1 | Roll Group 08.1 | | Fonsie Lodge | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | |
| 08.2 | Roll Group 08.2 | | Zebulan Turfus | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | |

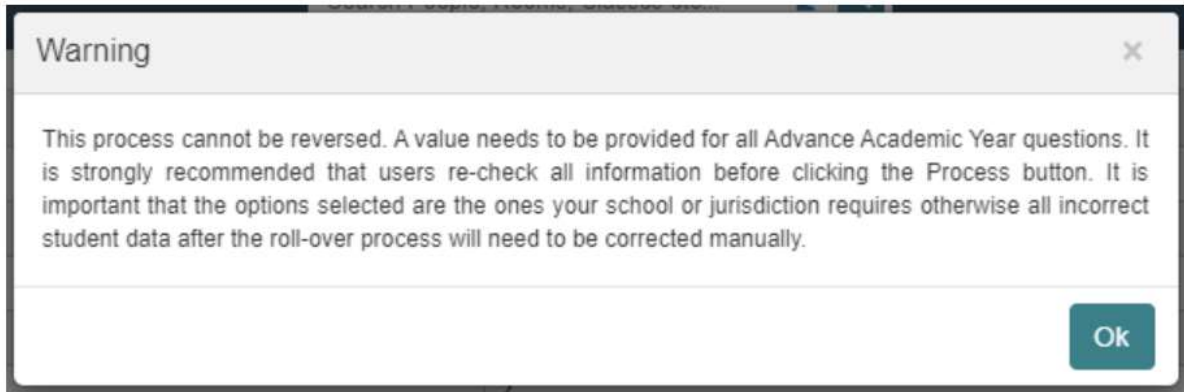
Navigation: 10 items per page, Export to Excel, 1 - 10 of 13 items

Close

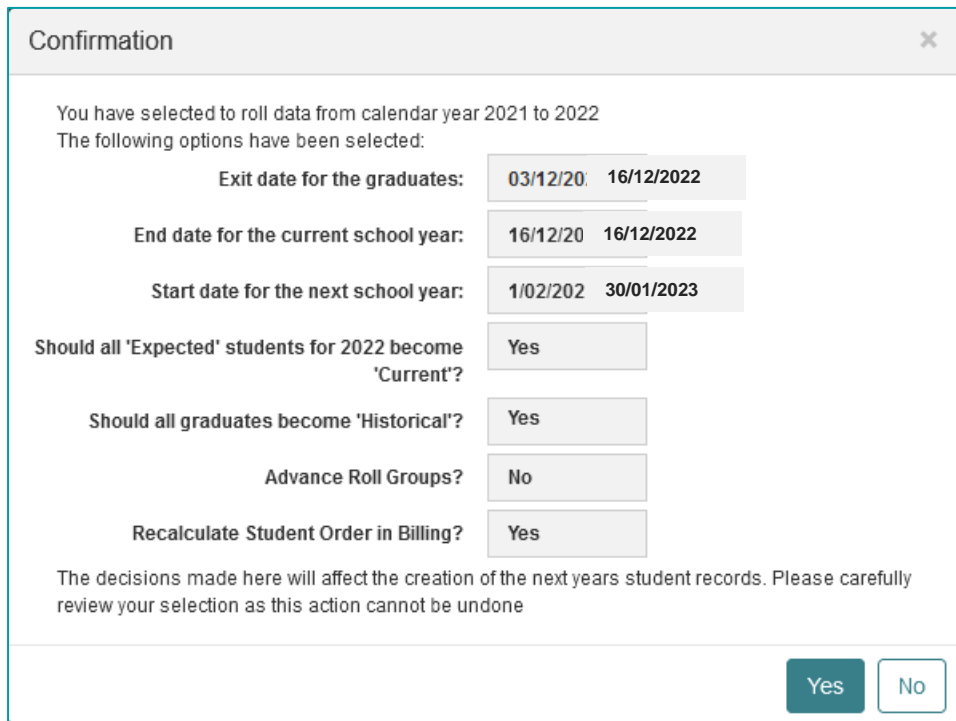
- c. Click **Edit** for each Roll Group and enter the Next Roll Groups for each line
 - d. Review/Assign the correct teachers to the Roll Groups
 - e. Ensure all Exit Roll Groups (Graduating classes) are flagged
 - f. Click **Close** to finish
9. Recalculate Student Order in Billing:
- a. As the AAY is being run at the end of the school year, select 'Yes' to reorder students within a Debtor Account to take account of exiting and new students.

Please confirm that all data is correct before clicking **Process** as this cannot be reversed and data will have to be corrected manually if an error is made.

10. Click **Process**. The following warning message will display:



11. Click **OK** and view the confirmation of options selected:



12. Select **Yes** to complete the process

A summary of the tasks completed by the Advance Academic Year process will then display.

Note: When the school has run the Advance Academic Year process and has not yet flagged the future calendar year to the current calendar year (step 2.15), the School Calendar field is available on the *Student Find* page and the *Adhoc Reports Data Selection* page. This field allows the user to choose whether they want to work with the students in the current year or the future year.

Post Advance Academic Year Tasks

2.9. Data Check

From the **Students** menu landing page, click on the 'Future Year 2023-2023' tab

1. Filter or sort the grid to check that there are the correct number of 'Current' (and 'Expected' if appropriate) students for the new year.
2. If the Advance Roll Groups option was selected as part of the AAY process, check that the correct students are assigned to each new Roll Group by grouping the grid by Roll Group. Future Year Roll Group Lists can be exported to Excel for further checking as required.

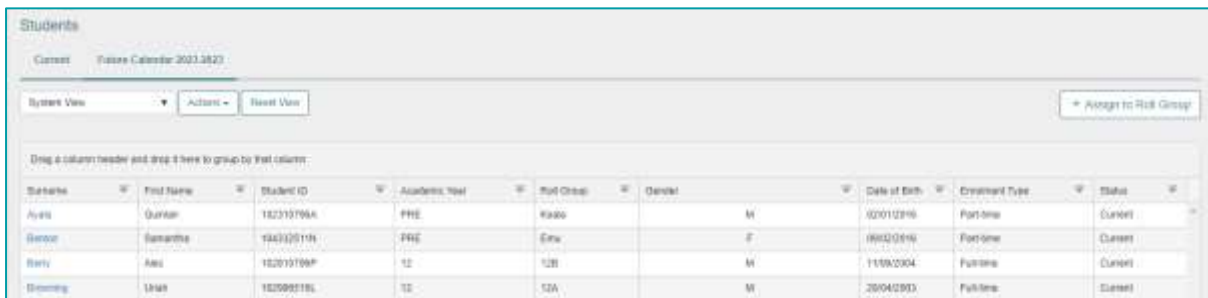
If Roll Groups were not assigned as part of the AAY process, see below:

2.10. Assign Roll Groups (Option 1)

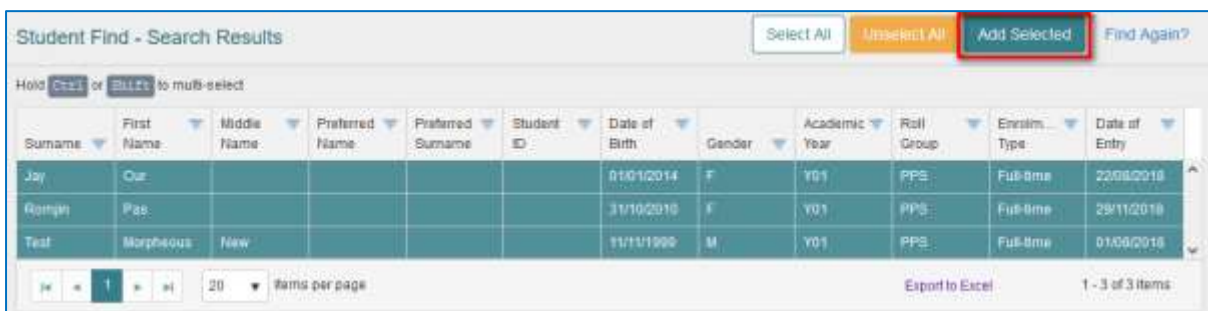
Students can be manually assigned to new Roll Groups from the **Future Calendar** tab on the Students landing page grid.

Note: This can only be done before the new year (2023) is marked as the Current Year in the School Calendar. After that, students must be assigned to new Roll Groups using Quick Edit (See Step 2.17) or individually.

1. Navigate to **Students** and click on the **Future Calendar 2023-2023** tab
2. Click Assign to Roll Group button



3. Use the Student Find screen to select a group of students (Hint: Select a Roll Group or Year level at a time).
4. Click **Select All** and **Add** to add students to the Assign Roll Group screen



5. Select a new Roll Group to assign students to

Assign Roll Group

New Roll Group Apply Save

6. Highlight students to assign to this Roll Group and click **Apply** (The new Roll Group will be assigned)
7. This can be saved at this point OR
8. Continue to select new Roll Groups and assign required students
9. Click **Save** to finish

Assign Roll Group

New Roll Group Apply Save

Current Students Use **Ctrl** or **Shift** to multi-select Select All Unassign All

Drag a column header and drop it here to group by that column

| Surname | First Name | Student ID | Academic Year | Current Roll Group | New Roll Group |
|---------|------------|------------|---------------|--------------------|----------------|
| Adams | Jack | | Y01 | PPW | Y1BA |
| Jay | Cur | | Y01 | PPS | |
| Romijn | Fas | | Y01 | PPS | |
| Test | Jacob | | Y01 | PPW | Y1BA |
| Test | Morpheus | | Y01 | PPS | |

20 items per page 2 student(s) selected Export to Excel 1 - 5 of 5 items

10. Repeat Steps 2 to 9 for all students in the school

2.11. Review Student Status

Any students who have already left your school that still have a status of 'Current' should be reviewed and their status changed to 'Historical' if applicable.

To review the status of students who have already left:

1. Click on the **Students** menu to view the '**Current**' students tab.

Students

Current Future Calendar 2022-2022

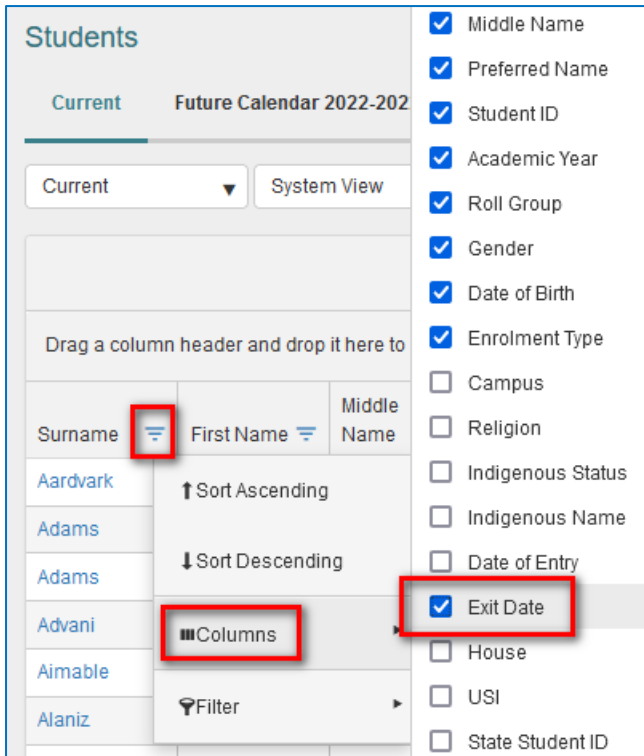
Current System View Actions Reset View

Search on Student First Name OR Surname

Drag a column header and drop it here to group by that column

| Surname | First Name | Middle Name | Preferred Name | Student ID | Academic Year |
|----------|------------|-------------|----------------|------------|---------------|
| Aardvark | John | | | | Y04 |
| Adams | Jack | | Reva | | Y01 |

- Click on one of the column chevron arrows and select **Exit Date** to display this column on the grid



- Sort the Exit Date column into descending order. Any students with an Exit Date in the past can be marked as 'Historical'.
- For each student, right click the **Surname** link to open their Student Information page in a new tab and change the Enrolment Status to Historical
- Save** the changes and close the tab

2.12. Transfer Historical Students to Past Members (Recommended but Optional)

All students that have left the school and have a status of Historical can be transferred to **Past Members** if required.

- Navigate to Transfer & Roll-over | Transfer to Past Members

Transfer to Past Members

⚠ Attention! This process was last completed on 19/04/2017 by Suzanne Taylor

Select All Process

| Surname | First Name | ID Number | Date of Birth | Age | House | Exit Grade | Exit date | Reason for Leaving | Role |
|---------|------------|----------------|---------------|-----|--------------------|------------|------------|-----------------------------|---------|
| Carroll | Niall | | 01/05/2005 | 12 | O'SULLIVAN (Green) | 07 | 05/04/2017 | Enrolled in home schooling | Student |
| Adams | Jenna | 2017032 | 21/04/2004 | 13 | | 08 | 27/06/2017 | Enrolled in home schooling | Student |
| Thorpe | Flynn | 20150521000494 | 12/08/2001 | 16 | O'SULLIVAN (Green) | 09 | 29/06/2017 | No longer resident in state | Student |
| Doyle | Dayton | 20150521000004 | 17/08/2000 | 17 | McK House (Red) | 10 | 27/03/2017 | Missing | Student |
| Dewar | Lachlan | 20150521000006 | 10/12/1999 | 18 | Blue (Blue) | 11 | 23/05/2017 | Enrolled in other school | Student |

1 of 2 items

2. To review the record(s) click on a **Surname** hyperlink (the record will open in a new browser tab)
3. Back on the grid **highlight** the record(s) you wish to transfer or click **Select All** to transfer all records in bulk
4. Click Process
5. Review the Caregiver options displayed. If a caregiver option is selected, a separate 'Past Member' record will be created for the caregivers linked to historical students (where they have no other children remaining at the school).

1 past member will be transferred.

Please indicate which groups of caregivers, if any, you would like to be given past membership.

Primary Caregivers

Secondary Caregivers

OK Cancel

6. Click **OK** to process and view the Confirmation message

Records can now be viewed from the Past Members grid.

2.13. Transferring Students between Schools

All Students leaving your school will appear in **Exiting Students**. All students set to transfer to your school from another school will appear in **Transferring Students**.

Exiting Students

Any clearance checklists or exiting information (such as Destination school) can be entered for students who have left by navigating to:

1. Transfer and Roll-over | Exiting Students

All Exiting students will be displayed in the grid for the date range selected and any required information can then be entered by clicking on the Surname link.

These students can then be 'transferred' to their destination schools if the schools belong to the same Jurisdiction.

Transferring In Students

Any students who have been 'transferred' to your school from another Jurisdiction school via the Transferring Students process can be viewed by navigating to:

2. Transfer and Roll-over | Transferring Students

Students shown under the **Pending Incoming** tab can be accepted or rejected as required.

Note: Students can only be transferred between schools where schools belong to the same Jurisdiction. See Online Help for further details on Transferring Students.

2.14. Set up Payment Due dates in CE Finance

Prior to any billing invoices being created in the new year, it is important to set up the new Payment Due dates in CE Finance. These payment due dates are then automatically assigned to all new invoices created (both in Billing and CE Finance). The payment due dates are what is used to calculate overdue invoices when receivables are aged.

1. Navigate to Term Codes (AZ2)
2. Select to edit 'E' for 'Education' Term code
3. Click 'Add New'
4. Enter the dates as required by your school
5. Click **Save**

The screenshot shows the 'Details' page for a term code. At the top right are buttons for 'Save', 'Cancel', 'Add New', and 'Help'. The 'Details' section includes:

- Trading Terms: E
- Description: Education
- Short Letter: (empty)
- Long Letter: (empty)
- Calculator Method: Number of school terms for payment: 4

Below this is a 'School Terms' table with two tabs: 'School Terms' (selected) and 'Settlement Discount'. The table has the following data:

| | Year | Term | Start Date | Payment Due Date |
|-------------------------------------|------|------|------------|------------------|
| <input checked="" type="checkbox"/> | 2022 | 1 | 01/01/2022 | 23/04/2022 |
| <input checked="" type="checkbox"/> | 2022 | 2 | 24/04/2022 | 16/07/2022 |
| <input checked="" type="checkbox"/> | 2022 | 3 | 17/07/2022 | 08/10/2022 |
| <input checked="" type="checkbox"/> | 2022 | 4 | 08/10/2022 | 30/11/2022 |

Note: If payment due dates are not set up prior to invoicing, the due date will be the date the invoice is created.

Tasks in the New Year (2023)

These tasks should be completed *in the new year* and before the first day of Term 1.

2.15. Update Current Calendar Setting

The Current Calendar Year should be updated to 2023 on or after 1 January 2023 and before the first day of Term 1.

The current calendar is viewed by navigating to **Settings | School | School Settings** and then selecting **School Calendar**.

The current year should display by default and is indicated by a tick next to current calendar field.

1. To set the future year as the current year click in the **Year** field and select the new School Calendar Year **2023-2023**

The screenshot shows the 'School Calendar' settings interface. The 'Year' dropdown menu is open, displaying a list of year ranges from 2019-2019 to 2022-2022. The option '2023-2023' is highlighted with a red box, indicating it has been selected. Below the dropdown, there is a 'Teaching Terms' section with a 'Term Name' field.

2. Click on the **Current Year** button to set the new school year.

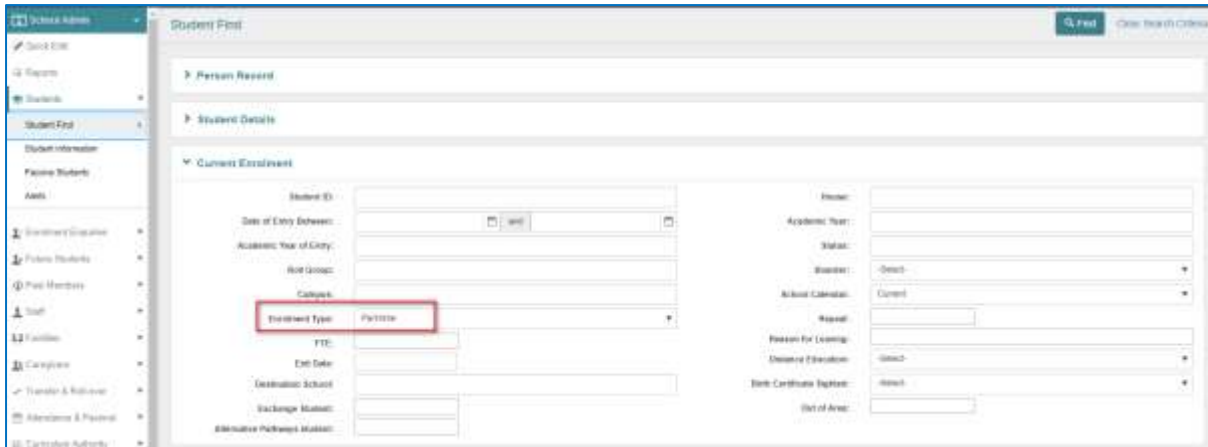
The screenshot shows the 'School Calendar' settings interface after the year has been updated. The 'Year' dropdown now shows '2023-2023'. The 'Year From' field is set to '1/01/2023' and the 'Year To' field is set to '31/12/2023'. A red box highlights the 'Current Year' button, which is used to confirm the selection.

3. If not previously entered, add any **Non-Attendance Days** that will occur during the term i.e., Public Holidays or Teacher Professional Development days as required.

2.16. Review Part-time Students

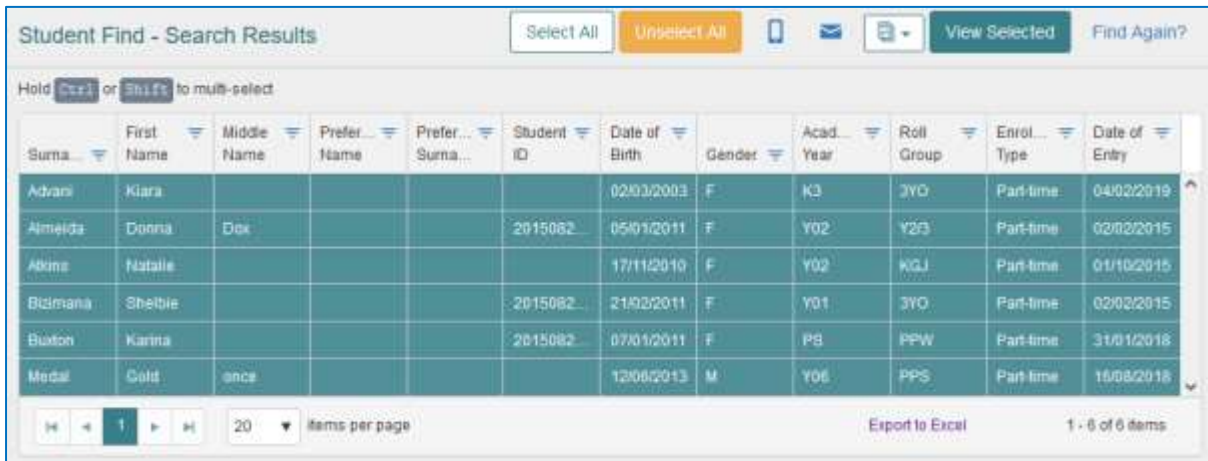
Any students who have a Part-time enrolment type may need to be reviewed so that the correct attendance records are built for the new school year.

1. Navigate to School Admin |Students |Student Find
2. Expand the Current Enrolment section and select 'Part-time' in the **Enrolment Type** field.
Click **Find**



The Student Find-Search Results grid can be sorted and filtered for specific Academic Years or Roll Groups if required.

3. Select the student records to review and click **View Selected**



This will create a browse of students to review.



- For each student that requires their part-time FTE and/or attendance pattern to be updated, expand the Enrolment section and click **Edit**
- Click in the **FTE** field and update the value. Review and update the **Attendance Days** if required.

Donna Almeida (20150821000783)
 Y02 Y03 Carter Primary School Part-time 70 Station Street, Australia

Go to: Person Student **Enrolment** Family & Contacts Documents & Notes Custom Fields More

Enrolment Type: Part-time
 FTE: 0.50
 Attendance Days:

| | Mon | Tues | Wed | Thur | Fri |
|-------|-------------------------------------|--------------------------|-------------------------------------|-------------------------------------|--------------------------|
| W1-AM | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| W1-PM | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| W2-AM | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| W2-PM | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

- Once all changes have been made click **Save** in the Enrolment section
- Use the browse set navigation tool to repeat for any other students
- Alternatively, these students can be updated in bulk using **Quick Edit**. From the **School Admin | Quick Edit** menu select the students required using **Find Current Students**
- Select the Edit Field of Enrolment Type, FTE and Attendance Days

Quick Edit

Edit Students: **Find Current Students** Find Future Students

Edit Field: Enrolment Type, FTE and Attendance days New Enrolment Type: -Select- New FTE: 0.00 Apply Save

Current Students Use **Ctrl** or **Shift** to multi-select **Select All** **Unselect All** **Select Blanks**

| Surname | First Name | Student ID | Academic Year | Current Enrolment Type | New Enrolment Type | Current FTE | New FTE |
|---------|------------|----------------|---------------|------------------------|--------------------|-------------|---------|
| Advani | Rhara | | K3 | Part-time | | 0.50 | |
| Almeida | Donna | 20150821000783 | Y02 | Part-time | | 0.50 | |
| Budon | Karina | 20150821000785 | PS | Part-time | | 0.50 | |

20 items per page 0 student(s) selected Export to Excel 1 - 3 of 3 items

- Select the New Enrolment Type and FTE:

New Enrolment Type: Full-time New FTE: 1.00

11. Highlight the students required and click **Apply** button

The screenshot shows the 'Quick Edit' interface. At the top, there are buttons for 'Find Current Students' and 'Find Future Students'. Below that, the 'Edit Field' is set to 'Enrolment Type, FTE and Attendance days', and the 'New Enrolment Type' is set to 'Full-time'. The 'New FTE' is set to '1.00'. The 'Apply' button is highlighted with a red box. Below the form, there is a table of students with columns for Surname, First Name, Student ID, Academic Year, Current Enrolment Type, New Enrolment Type, Current FTE, and New FTE. The table contains three rows of student data. At the bottom, there are pagination controls and a '3 student(s) selected' indicator.

| Surname | First Name | Student ID | Academic Year | Current Enrolment Type | New Enrolment Type | Current FTE | New FTE |
|---------|------------|----------------|---------------|------------------------|--------------------|-------------|---------|
| Adams | Klara | | K3 | Part-time | Full-time | 0.50 | 1 |
| Almeida | Diana | 20150821000783 | Y02 | Part-time | Full-time | 0.50 | 1 |
| Budon | Karina | 20150821000785 | PS | Part-time | Full-time | 0.50 | 1 |

Note: Students with the same attendance pattern can be done together.

2.17. Assign Roll Groups (Option 2)

Note: Assigning students in the new year only needs to be done where Roll Groups were not assigned during the AAY process, nor at Step 2.10 or, you wish to make changes to the Roll Groups already assigned to students.

1. Navigate to School Admin | Quick Edit
2. Click Find Current Students
3. Use the Current Enrolment search section to load a group of students (Hint: Select a Roll Group or Year level at a time)
4. Click Select All and Add
5. Select Roll Group from the Edit Field drop down list

The screenshot shows the 'Quick Edit' interface. The 'Edit Field' dropdown menu is open, and 'Roll Group' is selected. The 'Apply' button is highlighted with a red box.

6. Select a New Value (New Roll Group)
7. Highlight students and click **Apply** button
8. Select an effective date (use first day of Term 1 2023)
9. Repeat until all students are assigned to a Roll Group
10. Click **Save**

Repeat these steps until all students are assigned to the required new Roll Group for 2023.

2.18. Check Roll Groups

Roll Groups can be checked in several ways.

1. From the **Students** landing page grid, sort by Roll Group (Click once for Ascending) to identify any students without a Roll Group.

| Surname | First Name | Student ID | Academic Year | Roll Group | Gender | Date of Birth | Enrollment Type |
|---------|------------|------------|---------------|------------|--------|---------------|-----------------|
| Adams | Julia | 2017045 | 07 | | F | 09/05/2006 | Full-time |
| Avery | Cyril | 2017063 | 07 | | M | 01/07/2005 | Full-time |
| Black | Adam | 2017037 | 07 | | M | 16/05/2006 | Full-time |
| Davis | John | 2017043 | 09 | | M | 29/10/2003 | Full-time |
| Davis | Lucy | 2017042 | 11 | | F | 06/04/2002 | Full-time |

2. Use Group by (Click and Drag Column heading) Roll Group column. Export to Excel if required. Make any updates as necessary.

| Surname | First Name | Middle Name | Preferred Name | Student ID | Academic Year | Roll Group | Gender |
|------------------------------|------------|-------------|----------------|----------------|---------------|------------|--------|
| Roll Group: RIC3 (Count: 16) | | | | | | | |
| Agar | Jenny | Mary | Jen | | 11 | RIC3 | X |
| Andon | Tyra | Jean | Ty | 2017058 | 05 | RIC3 | F |
| Hayes | Aisling | | Aisling | | 12 | RIC3 | F |
| Hobden | Kerry | | | 20150821002003 | 10 | RIC3 | F |

3. Navigate to **School Admin | Reports**. Search for and select **Students by Roll Group** report. Select the parameters to run the report and print if required.

| Report Name | Report Description | Report Category Name | Report Group | Report Type | Created By | Created Date | Active | Shared |
|------------------------|--|----------------------|---------------|-------------|------------|--------------|-------------------------------------|--------------------------|
| Students By Roll Group | List of students in a roll group, including gender, birth date, age and year level | Current Students | Student Lists | Standard | sa | 25/06/2016 | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

4. From the **Teacher Toolkit | Groups** menu, search for each new Roll Group and check that the correct students are assigned. Click the **More Actions** button and select **Print Group List** if required.

3. End of Year in Timetabling

Schools using the CES Timetabling module

If the timetable has already been published for the new year, then it must also be *republished* after the AAY process is complete.

Schools integrating with a different timetabling product

If your school is integrating with a third-party timetabling product, for example, Edval or Timetabling Solutions, the latest version of the timetable must be sent to CES after the AAY process is complete.

Notes: When a timetable is published or imported into CES, the subject enrolments are connected to the enrolment detail records. For example, if the AAY process has not been run in 2022 and the timetable is published/imported for 2023, then the subject enrolments for the 2023 classes will be linked to the 2022 enrolment detail records.

When the AAY process is run in 2022 the system creates the enrolment detail records for 2023. Then when the timetable is republished/reimported, the system decouples the subject enrolment records from the 2022 enrolment detail records and recouples them with the 2023 enrolment detail records.

If this step is not done, then attendance will not be generated.

4. End of Year in Finance

The end of year in CE Finance consists of five parts: setting up the periods for the new year, setting up payment due dates in CE Finance, completing all processing for the year, completing a month end process and performing an end of year roll over.

The end of year for CE Finance should be done after the new year in order to ensure all transactions have been entered for the previous year.

4.1. Set up New Year and Periods

The new year and periods will need to be set up in CE Finance before starting the Year End process.

Navigate to **General Ledger | Setup Information | Years and Periods (GZA)**

If the next calendar year has not been generated already:

1. Click **Generate**
2. The next year to be generated should display in the **Year** field
3. Confirm that **Period 1 Start** is the first day of the first month for the new year
4. Click **OK**
5. Click **Save** and **Exit**

4.2. Set up Payment Due dates in CE Finance

- Confirm this step is completed
- Refer to 2.14. Set up Payment Due dates in CE Finance

4.3. Complete All Processing for the Year

Ensure all invoices, receipts, payments, journal entries and adjustments are entered for the year.

4.4. Complete End of Month Process

The usual End of Month process will need to be completed for December before the Year End process can be started.

1. After completing all processing in all ledgers (including depreciating assets if applicable) post to the GL via GP1
2. Follow the normal End of Month procedure for the month of December. Close all Ledgers. Do not close the General Ledger for December in order for the year end batches to be posted automatically.

4.5. Commence Year End Process

Once all processing end of month for December has been completed, the Year End process can be run.

This process will transfer the Profit & Loss YTD balance to the accumulated funds account and forward the Balance Sheet closing balances as the opening balances for the next year.

This process can be run again if required.

1. Navigate to General Ledger | Year End | Year End Close (GP5)
2. **Run** the year end process for the current fiscal year

5. Billing End of Year

5.1. Billing Account Deactivation

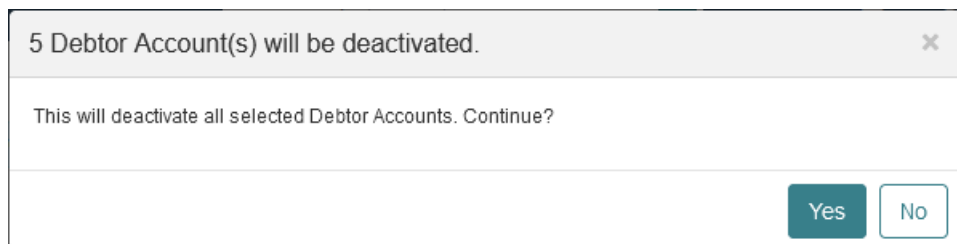
The Billing Account Deactivation menu provides functionality to bulk deactivate Debtor Accounts that no longer need to be used for billing purposes. Accounts will only display on the Account Deactivation page if they no longer have any 'Expected' or 'Current' students attached.

Debtor accounts can be made active again if required at a later date.

If the Debtor account does not have a zero balance, they may still be deactivated in Billing but will remain active in Finance until the balance is cleared. Once the balance of the account is cleared the Debtor account can be flagged as inactive in Finance.

To bulk deactivate Debtor Accounts

1. Navigate to Billing | Debtor Account | Account Deactivation
2. Highlight the Accounts to deactivate (Hint: use <Ctrl> on your keyboard) or click **Select All**
3. Click Deactivate
4. Click **Yes** to confirm



A confirmation dialog box with a title bar that reads "5 Debtor Account(s) will be deactivated." and a close button (X) in the top right corner. The main text of the dialog asks "This will deactivate all selected Debtor Accounts. Continue?". At the bottom right, there are two buttons: a teal "Yes" button and a white "No" button with a teal border.

6. Checklist

| Step | Process | Check |
|------------------------------------|--|--------------------------|
| End of Year in School Admin | | |
| 1. | Check Academic Years | <input type="checkbox"/> |
| 2. | Confirm current year in School Calendar | <input type="checkbox"/> |
| 3. | Confirm next School Calendar year is available | <input type="checkbox"/> |
| 4. | Review Exiting students | <input type="checkbox"/> |
| 5. | Repeating students | |
| a) | Review Existing Repeating Students | <input type="checkbox"/> |
| b) | Flag Repeating Students | <input type="checkbox"/> |
| 6. | Transfer Future Students (Optional) | <input type="checkbox"/> |
| 7. | Review Existing Expected Students | <input type="checkbox"/> |
| 8. | Run Advance Academic Year | <input type="checkbox"/> |
| 9. | Future Year Data Check | <input type="checkbox"/> |
| 10. | Assign Roll Groups (Option 1) | <input type="checkbox"/> |
| 11. | Review student status | <input type="checkbox"/> |
| 12. | Transfer 'Historical' students to Past Members (Optional) | <input type="checkbox"/> |
| 13. | Transferring students (Optional-Jurisdiction Schools only) | <input type="checkbox"/> |
| 14. | Set up Payment Due dates in CE Finance | <input type="checkbox"/> |
| Tasks in the New Year | | |
| 15. | Update current calendar | <input type="checkbox"/> |
| 16. | Review Part-Time Students | <input type="checkbox"/> |
| 17. | Assign Roll Groups (Option 2) | <input type="checkbox"/> |
| 18. | Check Roll Groups | <input type="checkbox"/> |
| End of Year in Timetabling | | |
| 19. | Republish/reimport the timetable | <input type="checkbox"/> |
| End of Year in Finance | | |
| 20. | Create new year and periods | <input type="checkbox"/> |
| 21. | Set up Payment Due dates in CE Finance | <input type="checkbox"/> |
| 22. | Complete all transaction processing for the year | <input type="checkbox"/> |
| 23. | Complete month end process for December | <input type="checkbox"/> |
| 24. | Process Year End (GP5) | <input type="checkbox"/> |
| Billing | | |
| 25. | Deactivate Debtor accounts | <input type="checkbox"/> |

7. Appendix

Configure Global Calendar

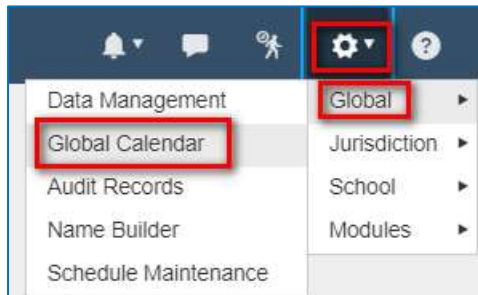
| Name | Start Date | End Date | Last Published Date | Published By |
|-----------|------------|------------|---------------------|---------------------------|
| 2024-2024 | 01/01/2024 | 31/12/2024 | | |
| 2023-2023 | 01/01/2023 | 30/12/2023 | 29/09/2022 10:01:04 | Sarah Matheson (Civica) |
| 2022-2022 | 01/01/2022 | 31/12/2022 | 03/03/2022 15:34:25 | Sarah Matheson (Civica) |
| 2021-2021 | 01/01/2021 | 31/12/2021 | 18/05/2020 12:22:21 | Jacqueline Smith |
| 2020-2020 | 01/01/2020 | 31/12/2020 | 14/04/2019 14:56:25 | Sarah Bailey |
| 2019-2019 | 01/01/2019 | 31/12/2019 | 25/09/2018 10:17:15 | Shadi Aghajanian (Civica) |

New Global Calendar Setup

The new school calendar year and teaching terms must be set up for the new school year before the AAY process can be run so that the task can pick up the new school year information.

Note: When setting up the new calendar all dates entered must be in the future therefore the new year calendar setup must be completed *before* the end of the current calendar year.

1. Access the Global calendar through **Settings | Global | Global Calendar**



2. Click Add New
3. Enter the dates for the new school year and click **Save**

Calendar ✕

Year From :

Year To :

Note: Calendar Year dates should always be set up from 1st January to 31st December to ensure student enrolment records can be viewed from 1st Jan in the new year.

4. Enter the **Start** and **End** dates for all terms (see Important Note above)

Note: It is important that the term dates are correctly set before publishing the calendar as there are specific rules associated with re-publishing this information, once the calendar is published.

For Jurisdiction schools, if the calendar needs to be republished, and any of the schools have run the Advance Academic Year process for the matching calendar year, then the 'Add New' button for Terms and the 'Delete' and 'Edit' icon for Term 1 will be disabled.



5. Click **Save** for each term

| Term Name | Start Date | End Date | | |
|-----------|------------|------------|--|--|
| Term 1 | 30/01/2023 | 06/04/2023 | | |
| Term 2 | 24/04/2023 | 30/06/2023 | | |
| Term 3 | 17/07/2023 | 22/09/2023 | | |
| Term 4 | 09/10/2023 | 14/12/2023 | | |

6. Click **Edit** in **Non-Teaching Days**, make selections and click **Save**

| Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday |
|--------|---------|-----------|----------|--------|----------|--------|
| | | | | | | |

7. Enter any **Non-Attendance Days** as required by clicking on **Add New**
8. Complete the details and click **Save**

New Non Attendance Days X

Date From: To:

Day Type: ▼

Description:

All Academic Years:

Academic Year:

Note: Public Holidays and other Non Attendance Days set up in the Global Calendar, cannot be edited by individual schools once the global calendar is published.

Additional Non Attendance Days days can, however, be added by schools in their School Calendar as required.

9. Click Publish

The future calendar is then available to view at the school level (Settings | School | School Settings | School Calendar).

| Document Control: | | | |
|--------------------------|------------------|--------------|---|
| Version: | Author: | Date: | Comments: |
| 0.1 | Sandy Bracher | 04/09/2020 | Created document |
| 1.0 | Heike Mullee | 05/10/2020 | Reviewed and updated |
| 2.0 | Allison Doubikin | 04/12/2020 | Further updates |
| 2.1 | Omayya Hourani | 07/12/2020 | Finance updates |
| 2.2 | Omayya Hourani | 01/02/2021 | Finance updates |
| 2.3 | Allison Doubikin | 6/08/2021 | Updated version 1.11 to 2.00 only |
| 2.4 | Omayya Hourani | 6/08/2021 | Finance updates for 2021 |
| 2.5 | Derek Mathieson | 09/08/2021 | Reviewed and updated |
| 2.6 | Allison Doubikin | 11/08/2021 | Further updates |
| 2.7 | Allison Doubikin | 19/08/2021 | Timetabling updates |
| 2.8 | Siang Neik | 23/09/2021 | Updated for version 2.0.7 patch |
| 2.9 | Omayya Hourani | 23/09/2021 | Updated CE Finance for 2021 |
| 3.0 | Derek Mathieson | 24/09/2021 | Proofed and minor editing |
| 3.1 | Adrian Liew | 20/10/2021 | Changes in Finance in checklist based on recommendation by Omayya |
| 3.2 | Derek Mathieson | 16/11/2021 | Minor Update after Testing |
| 3.3 | Derek Mathieson | 01/12/2021 | Re-branded as v2.1 |
| 3.4 | Derek Mathieson | 01/10/2022 | Updated for v2.2 and 2022 |
| 3.5 | Omayya Hourani | 03/10/2022 | Proofed and minor editing. Updated CE Finance for 2022 |

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