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Integris Classic

2019 Admin EOY Fact Sheet

Document Versions

Ver.	Reason	Who	Date
1.0	Document Control & Footers added	Adam Catterall (RMA-WA)	03/07/03
1.1	Update for Term 3 2003	Michael Schmidt (RMA-WA)	09/07/03
1.2	Added front page	Adam Catterall (RMA-WA)	09/07/03
1.3	Further revisions	Adam Catterall (RMA-WA)	15/07/03
1.4	Minor changes before printing	Adam Catterall (RMA-WA)	16/07/03
1.5	Update for Term 1, 2004	Michael Schmidt (RMA-WA)	21/01/04
1.6	Formatting changes	Adam Catterall (RMA-WA)	21/01/04
1.7	Minor changes following DET review	Michael Schmidt (RMA-WA)	30/01/04
1.8	Final changes for web version	Adam Catterall (RMA-WA)	17/02/04
1.9	Update for Integris 6.70.00 & T2 2004	Michael Schmidt (RMA-WA)	22/04/04
2.0	Fixed screen-shot call-out	Adam Catterall (RMA-WA)	29/04/04
3.0	Update for Term 1 2005	Michael Schmidt (RMA-WA)	31/01/05
3.1	Add new company info	Adam Catterall (RMA-WA)	31/01/05
4.0	Updates for Admin V6.82.01	Tracey Scattini (RMA-WA)	10/08/05
4.1	Changes after DET proof reading	Tracey Scattini (RMA-WA)	22/08/05
4.2	Minor proofing changes	Paul Gabelich (RMA-WA)	22/08/05
4.3	Changes to backup procedure by DET	Paul Gabelich (RMA-WA)	30/08/05
4.4	Updating Factsheet for 2006	Sidney Loke (RMA-WA)	29/09/06
4.5	Update after DET review	Kerry Dickinson (RMA-WA)	11/10/06
4.6	Minor revisions after DET review	Kerry Dickinson (RMA-WA)	12/10/06
4.7	Minor revisions after RMA review	Kerry Dickinson (RMA-WA)	18/10/06
4.8	Minor revisions after DET review	Paul Gabelich (RMA-WA)	18/10/06
4.9	Updated footer	Paul Gabelich (RMA-WA)	24/10/06
5.0	New Format and update for 08	Sidney Loke(RMA-Vic)	28/06/07
5.1	Updated EOY Checklist	Sidney Loke(RMA-Vic)	18/07/07
5.2	Minor amendments to updated checklist	Sidney Loke(RMA-Vic)	18/07/07
5.3	Further formatting	Susan Richardson (RMA-WA)	18/07/07
5.4	Updated Contents page	Sidney Loke (RMA – Vic)	19/07/07
5.5	Minor correction after DET review	Paul Gabelich (RMA-WA)	19/07/07

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Ver.	Reason	Who	Date
5.6	Changes requested by DET	Kerry Dickinson and Susan Richardson	23/08/07
5.7	Term dates added and further DET changes	Paul Gabelich	24/08/07
5.8	Updated Process End of Year screen capture as requested by DET	Paul Gabelich	27/08/07
5.9	Updated for 6.86.11	Kerry Dickinson (RMA-WA)	11/09/07
6.0	Update for 6.87.10	Joshua Kragt (RMA-NT)	11/10/07
6.1	Minor format corrections	Paul Gabelich (RMA)	19/10/07
6.2	DET requested changes and update for V6.88.31	Anthony Harris (RMA-WA)	17/07/08
6.3	Further updates for V6.88.31	Shauna Henry (RMA-WA)	22/07/08
6.4	Minor editing	Kerry Dickinson (RMA-WA)	22/07/08
6.5	File Name and Footer	Kerry Dickinson (RMA-WA)	23/07/08
6.6	Updated after DET review	Kerry Dickinson (RMA-WA)	24/07/08
6.7	Updated after DET review	Kerry Dickinson (RMA-WA)	29/07/08
6.8	Minor corrections	Paul Gabelich (RMA)	30/07/08
6.9	Corrected screen shot	Paul Gabelich (RMA)	01/08/08
7.0	Updated 2009 Term dates and Public Hols	Paul Gabelich (RMA)	04/08/08
7.1	Added RM Billing and Curriculum DET requests	Paul Gabelich (RMA)	11/08/08
7.2	Updated with additional TT information	Paul Gabelich (RMA)	15/08/08
7.3	Revision of TT information	Kerry Dickinson (RMA-WA)	15/08/08
7.4	Minor Editing	Kerry Dickinson (RMA-WA)	15/08/08
7.5	Added additional information to step 4	Paul Gabelich (RMA)	10/12/08
7.6	Update for 2009	Joshua Kragt (RMA)	21/07/09
7.7	Proofed with minor corrections	Shauna Henry (RMA)	24/07/09
7.8	Updated table of contents	Susan Richardson (RMA)	27/07/09
7.9	Updated after DET Review	Joshua Kragt (RMA)	11/08/09
8.0	Updated after DET Review	Joshua Kragt (RMA)	20/08/09
8.1	Updated after training	Joshua Kragt (RMA)	21/09/09
8.2	Began update for 2010	Joshua Kragt (RMA)	20/12/09
8.3	Update for 2010	Derek Mathieson (RMA)	16/08/10
8.4	Reviewed and amended	Susan Richardson (RMA)	20/08/10
9.0	Updated following DoE review	Susan Richardson (RM Ed)	02/09/10

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Ver.	Reason	Who	Date
10.0	Error corrected	Susan Richardson (RM Ed)	13/09/10
10.1	Updated for 6.94.10 and 2011	Derek Mathieson (RM Ed)	19/07/11
11.0	Updated after DoE Review	Derek Mathieson (RM Ed)	29/07/11
12.0	Updated Term Dates for 2012	Derek Mathieson (RM Ed)	09/09/11
12.1-12.3	Updated for 6.96.10 and 2012	Derek Mathieson (Civica Ed)	20/07/12
13.0	Published after DoE Review	Derek Mathieson (Civica Ed)	06/08/12
14.0	Proofed by DoE and re-published	Derek Mathieson (Civica Ed)	08/08/12
16.0	Correction and re-published	Derek Mathieson (Civica Ed)	12/09/12
16.1	Updated for 6.98.10 and 2013	Derek Mathieson (Civica Ed)	16/07/13
17.0	Published after DoE Review	Derek Mathieson (Civica Ed)	19/07/13
17.1	Updated for 7.00.10 and 2014	Shauna Henry (Civica Ed)	08/07/14
17.2	Reviewed and amended	Shauna Henry (Civica Ed)	09/07/14
17.3	Further amendments	Shauna Henry (Civica Ed)	17/07/14
17.4	Reviewed and amended	Derek Mathieson (Civica Ed)	15/08/14
17.5	Updated for 7.03.10 and 2015	Shauna Henry (Civica Ed)	24/07/15
17.6	Amended after DoE Review	Derek Mathieson (Civica Ed)	29/07/15
17.7	Further amendments after DoE Review	Derek Mathieson (Civica Ed)	03/08/15
18.0	Published after DoE Review	Derek Mathieson (Civica Ed)	03/08/15
19.0	Correction and re-published	Derek Mathieson (Civica Ed)	23/10/15
20.0	Correction (DoE Request) and re-published	Derek Mathieson (Civica Ed)	20/11/15
21.0	Correction (DoE Request) and re-published	Derek Mathieson (Civica Ed)	03/12/15
22.0	Minor Corrections and re-published	Derek Mathieson (Civica Ed)	07/12/15
22.1	Updated for 7.06.10 and 2016	Derek Mathieson (Civica Ed)	06/07/16
23.0	Published after DoE Reviews	Derek Mathieson (Civica Ed)	26/07/16
23.1	Updated for 7.08.10 and 2017	Derek Mathieson (Civica Ed)	15/09/17
23.2	Corrections after DoE Review	Derek Mathieson (Civica Ed)	19/09/17
24.0	Published after DoE Reviews	Derek Mathieson (Civica Ed)	20/09/17
24.1	Updated for 2018	Shauna Henry (Civica Ed)	24/07/18
24.2	Minor editing after DoE Review	Shauna Henry (Civica Ed)	23/08/18
24.3	Updated for 2019	Shauna Henry (Civica Ed)	23/09/19

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Ver.	Reason	Who	Date
24.4	Reviewed and amended	Derek Mathieson (Civica)	26/09/19
25.0	Edited and Published after further DoE Reviews	Derek Mathieson (Civica)	27/09/19

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IMPORTANT:
This Fact Sheet explains the procedures for processing Admin Year End. Steps 4 and 12 assume the Customer Service Centre has provided you with the New Safe Backup for making a backup of the data file. If you do not have the New Safe Backup, contact the Customer Service Centre on 9264 5555 (metro), 1800012828 (regional) or Customer.Service.Centre@education.wa.edu.au

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End of Year Checklist

The following list outlines the steps involved in the Year End process. Preparing for Year End can commence at any time, with the final Year End Process being run at a time that suits your school, usually either at the end of the current year or the beginning of the next year.

Tick each step as it is completed.

Step	Function	Completed
1.	Bring your datafile up to date	
2.	Print form lists for all forms and years	
3.	Check Intake and Leavers Year in School Details	
4.	Back up the datafile	
5.	Set up the school calendar for the new year	
6.	Defining Semester/Timetabling Periods	
7.	Set up form descriptions for the new year	
8.	Set up Leavers	
9.	Increment students' proposed years and proposed forms	
10.	Print reports showing proposed years and forms	
11.	Print student lists for future reference	
12.	**Back up the Data File**	
13.	Process Year End	
14.	Check Year End was successful	
15.	Process Admissions Students	
16.	Reinstate Former Roll students to the Current Roll	
17.	Move External Roll Students to the Former Roll	
18.	Changing Student FTE	
19.	Update Staff Details	
20.	Update Form Descriptions	
21.	Deactivate or Delete Form Rooms	
22.	Repeating Student; check they are flagged	
23.	Assign Family Representatives	
24.	Print State Archives Report	
25.	Set up New Attendance Year	
26.	Notification of Transfer	
27.	Checking Student's Destination School	
28.	Purge the Audit Trail	

Part A (Steps 1-11)	Can be completed prior to 19 December 2019
Part B (Steps 12-27)	To be completed on or after 19 December 2019

Note: Daily Records must be created AND attendance data entered for students' last day of attendance BEFORE you Process Year End.

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IMPORTANT

RM Billing Schools must not perform the RM Billing End of Year process until:

- ***The Administration Manager Year-End process has been completed; and***
- ***The system is in the New Year (that is, the date must be on or after 1 January 2020).***

Refer to the RM Billing End of Year Fact Sheet for further information.

Step 1: Bring your Data File up to Date

Ensure students who have left, have been moved to the Former Roll and students coming to the school next year have been added to the Admissions Roll. If using the Lesson Attendance module, ensure attendance data is up to date.

IMPORTANT

Do not move leavers to the Former Roll. This is carried out automatically when processing Year End

Step 2: Print Form Lists for all Forms/Years

It is recommended that users create a checklist for each Form/Year Group in order to show current and Proposed Forms/Years.

Setting up this report as follows will produce a checklist for use with the Year End process. Use the lists to record proposed forms against current forms.

For each form group:

- Write the name of the students new (proposed) form against the current form
- Mark the names of individual students who will be moving to forms/years that are different from the proposed form/year for the remainder of students in the list.

Note: Some students may be repeating their current year.

- On the lists, mark as ***Leaver*** any students in the Leavers year (for example Year 6 in Primary Schools [for 2019] and Year 12 in Secondary Schools), as well as any other students who will be leaving.

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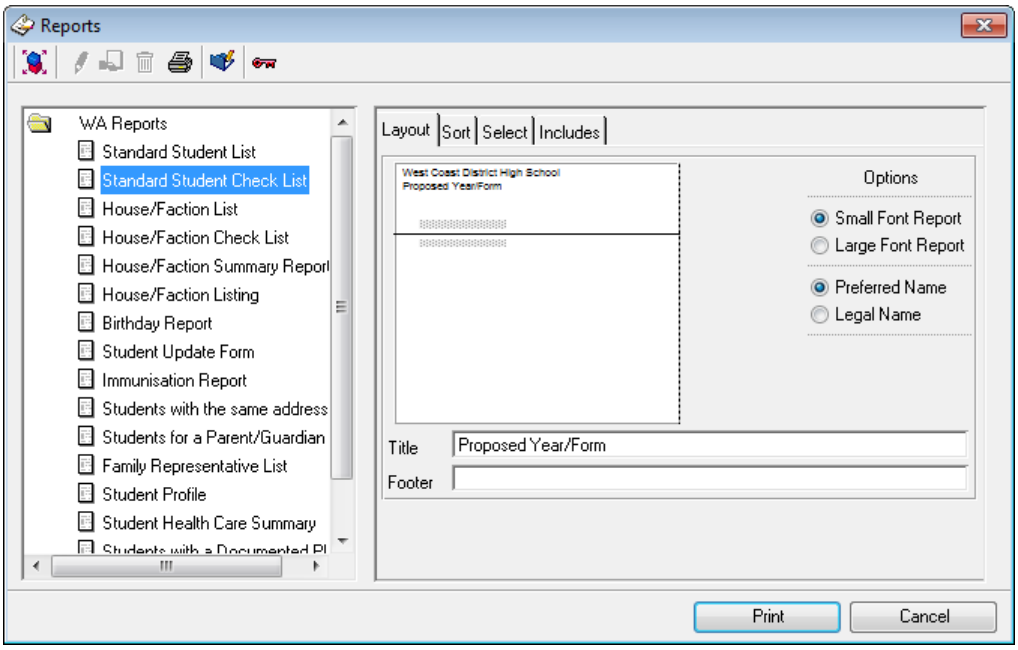
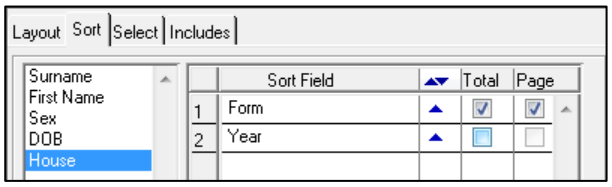
WA Reports > Reports > WA Reports > Standard Student Check List

- Enter ***Proposed Year and Form*** as the Title
- Directions for staff can be typed into the Footer if required

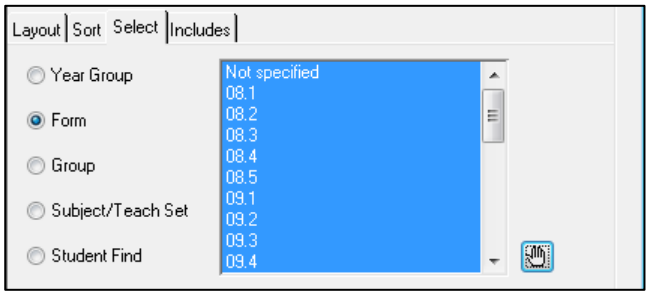


- Click the ***Sort*** tab
- Double click ***Form*** then ***Year***
- Check ***Total*** and ***Page*** against ***Form***



- Click ***Select*** tab and choose ***Form*** option

- Click ***Select All*** to highlight all forms



- Select the ***Includes*** tab
- Check ***Form Teacher(s), Student Form, Student Year Group*** (in that order)

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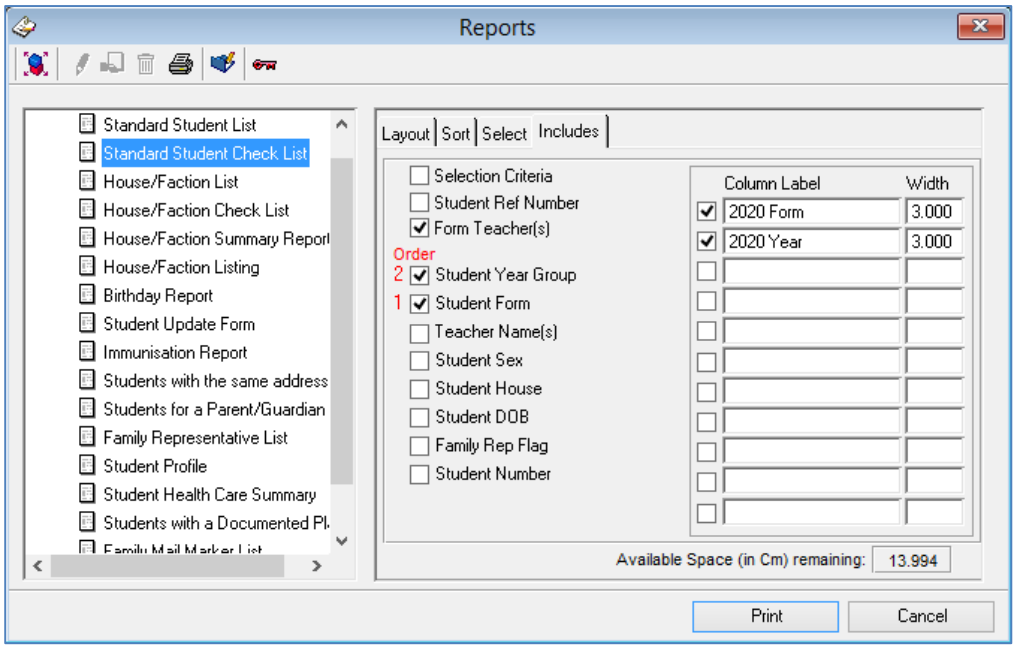
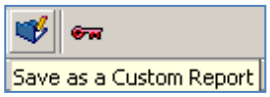
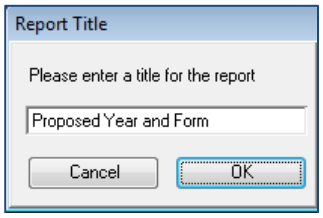


- Tick the first two columns and enter the column labels: ***2020 Form*** and ***2020 Year***
- Enter the columns widths you require (3 or 4 cm is sufficient)
- Click ***Print***

In order to use this checklist again, users can save it as a custom report by clicking on the blue folder at the top of the screen.



- Enter a name for the custom report



- Click ***OK***

***Note: The report can be then accessed for later use via* Admin > WA Reports > Reports > Custom Reports.**

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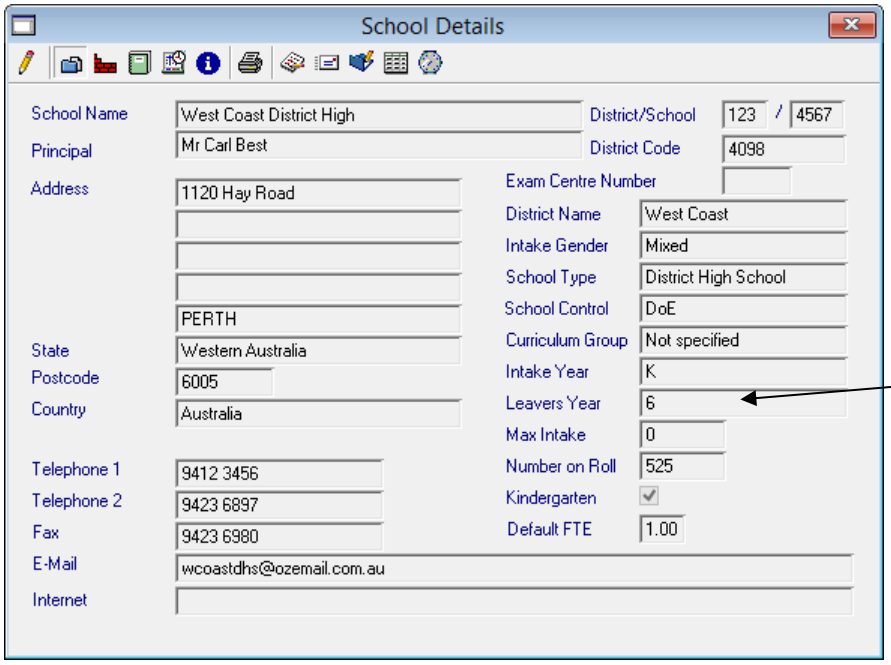
Step 3: Check the Intake and Leavers Year in School Details

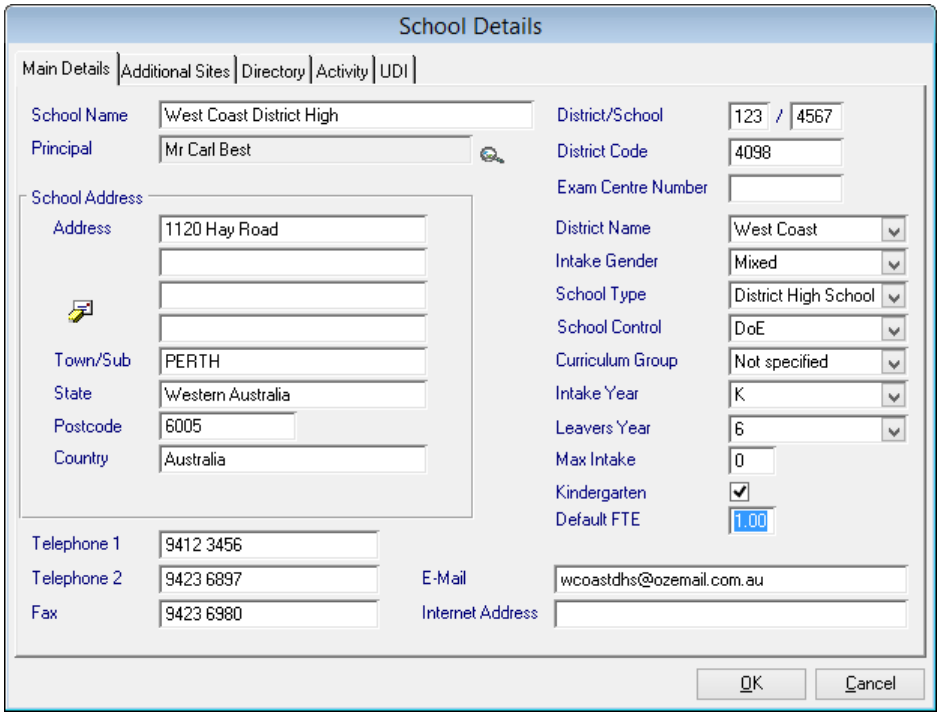
This is necessary so that the students in the final year of the school will automatically be transferred to the Former Roll as part of the Year End process. Therefore, it is not necessary to manually move Leavers to the Former Roll. The Leavers' Year should already be set up.

This can be checked at **General > School Details > Leavers Year**. For example, if Year 6 is the final year in a Primary School then the Leavers Year will be 6.



If the Leavers Year is incorrect, edit it in School Details.

School Details in Edit Mode



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Step 4: Back up the Data File

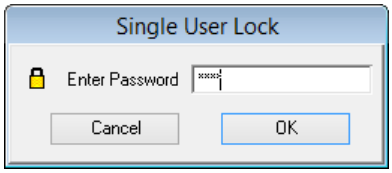
It is necessary to make a copy of the data file as it stands *before* you set up a new academic year, in case you inadvertently delete the current year's data. This involves making a copy of the current year's data file and storing it in a folder where it is accessible if needed.

The New Safe Backup should be used to make a backup of your data at this time.

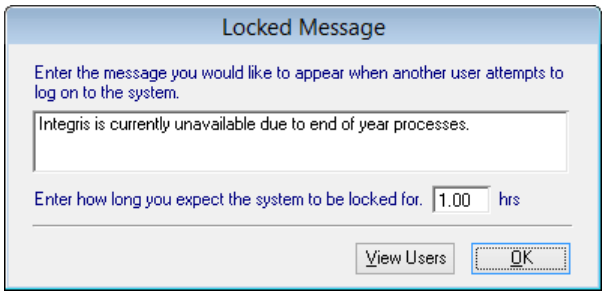
Ensure all users are logged out of Integris and the datafile is in **Single User Lock** prior to using the New Safe Backup.

To go into Single User Lock:

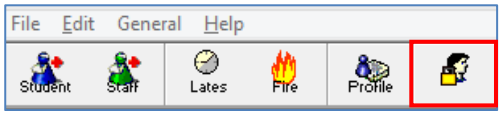
- Click on the File Menu and select Single User Lock
- Enter your password and click OK



- Enter an appropriate Locked Message and click OK



The Single User Lock icon will display in the top toolbar.



Read more about New Safe Backup and Single User Lock

IMPORTANT

You will be asked to repeat this backup prior to processing Year End (Step 12) because of any changes you have made to the datafile between now and then.

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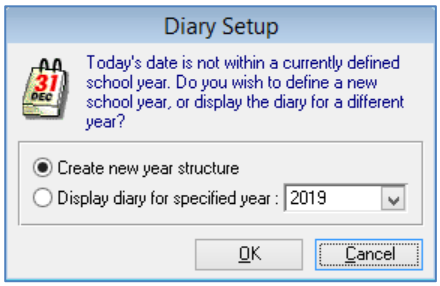
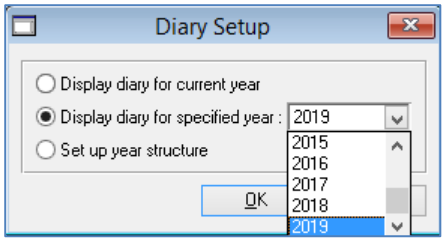
Step 5: Set up the School Calendar for the New Year

- To see if the new academic year has been previously set up, navigate to ***General > School Details > Display School Diary***

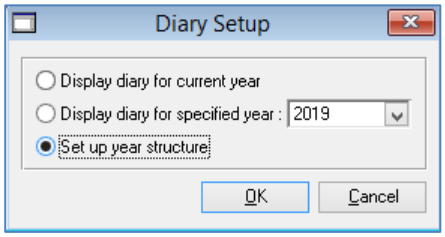
Note: If the diary is opened outside of the school year, the following window opens and users will need to select the option they require.



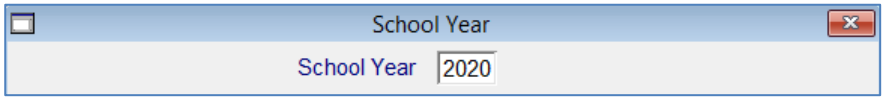
- Click on Setup School Year
- Place the radio button in front of ***Display diary for specified year*** and, if possible, choose ***2020*** from the drop-down list



- If **2020** does not appear in the drop-down list, the calendar has not yet been set and will have to be set up
- Click on ***Set up year structure*** and 2019 will appear in School Year field



- Click ***OK***
- Change **2019** to **2020** in the School Year window and then press ***<Tab>***



- You will be asked if you wish to discard the unsaved data, click ***Yes***

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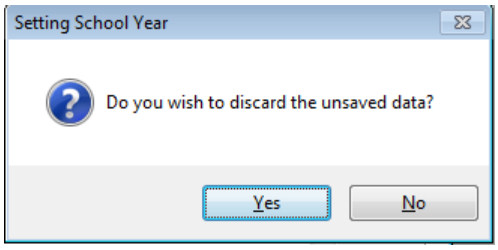
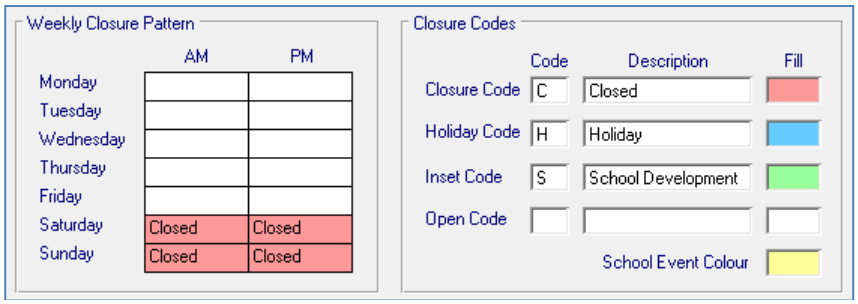
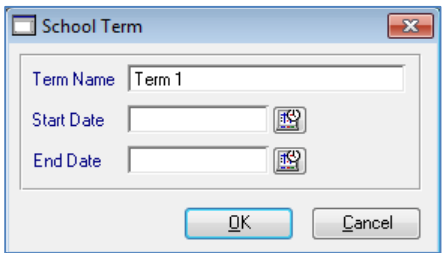


Note: This deletes last year's term dates but does not affect the current year diary

- Overtype the Inset code ***I Inset*** with ***S School Development*** (This cannot be edited later)

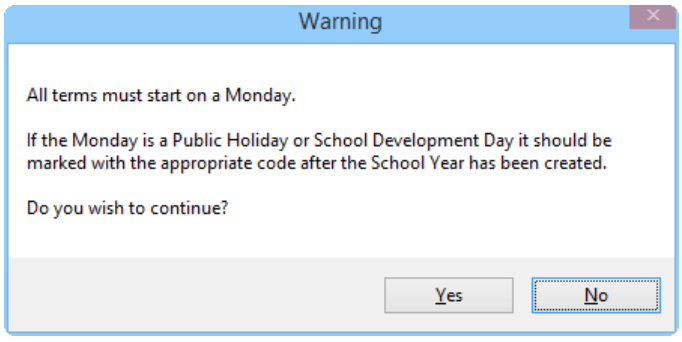


- To enter the term dates, click Add Term
- If there is already data for a ***Term*** use the ***Edit*** button to edit the dates if necessary
- Enter the name for the ***Term*** you are adding, then <***Tab***> to the ***Start Date*** field



- Enter the start date for the ***Term***

If the date selected to start a Term is not a Monday, the following warning will appear. See important information about Term start dates on the next page.



- If this message displays, click No and change the Start Date to a Monday

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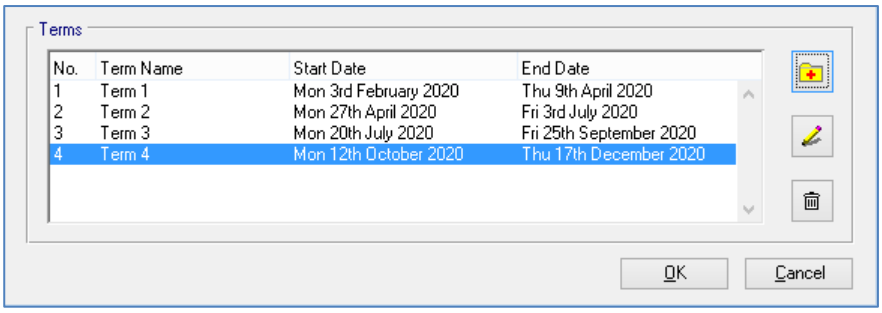
IMPORTANT

The date entered for the beginning of the term must be a Monday as this has implications for both Timetabling and Lesson Attendance. Any days where students are not expected to attend school should be entered into the diary as holidays or School Development days.

- Press <***Tab***>
- Enter the ***End Date*** for the term and click ***OK***

- Click to enter details for the next term.
- Click ***OK*** (in the School Term window) as each term's data is entered
- Enter all terms

The details are displayed in the Terms window on the School Year screen. After entering details for all the terms in the year and the closure code, review the data.



- Click ***OK*** to finish

The School Diary window now displays 2020.

IMPORTANT

Ensure the term dates are accurate. These dates were correct at the time of printing.

Please refer to http://www.det.wa.edu.au/education/termdates/ to confirm dates prior to input.

Note: Dates may be entered by typing them in (for example, 03022020) or by selecting them using the Activity Calendar button. Double-click on a date in the Calendar ***to select the required date. Make sure you enter or select the correct year.***

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5.1 Term Dates and School Development Dates For 2020

It is critical when setting up the School Diary in SIS for 2020, that the term dates are entered correctly. Errors in the School Diary will have an impact on Lesson Attendance accuracy and on the timetable in Secondary Schools using the Timetable Module.

Term dates may be accessed from the Department's website:
http://www.det.wa.edu.au/education/termdates/

Public Holidays may be accessed at the following website:
https://www.commerce.wa.gov.au/labour-relations/public-holidays-western-australia

Term Dates and Public Holidays For 2020

Notes: These dates are accurate as of August 2019. Please check with DoE and your school Administration Team for confirmation of School Development Days and student start dates. When establishing the Terms in the SIS School Diary, ALL Terms MUST begin on a Monday and the days where students are not required to attend should be marked as either Public Holidays or School Development Days as appropriate.

Term 1, 2020	
Monday 3 February – Thursday 9 April (10 weeks)	
Students Return	Monday 3 February
School Development Days	1 Day before students return - Friday 31 January
Term 2, 2020	
Monday 27 April – Friday 3 July (10 weeks)	
Students Return	Tuesday 28 April
School Development Days	Dates determined by the school
Term 3, 2020	
Monday 20 July – Friday 25 September (10 weeks)	
School Development Days	Dates determined by the school
Term 4, 2020	
Monday 12 October – Thursday 17 December (10 weeks)	
Students Finish	Thursday 17 December
School Development Days	Dates determined by the school

Note: There are six school development days where students do not attend. Two of these days are before the school year starts for students and one day is after the school year ends for students.

All public schools now have the flexibility to trade off school development days except Thursday 30 January 2020 and Friday 31 January 2020.

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Note: The Public Holidays falling during term have been highlighted.

When New Year's Day, ANZAC Day or Christmas Day fall on a Saturday or Sunday, the next following Monday is also a public holiday. When Boxing Day falls on a Sunday or Monday, the next following Tuesday is also a public holiday.

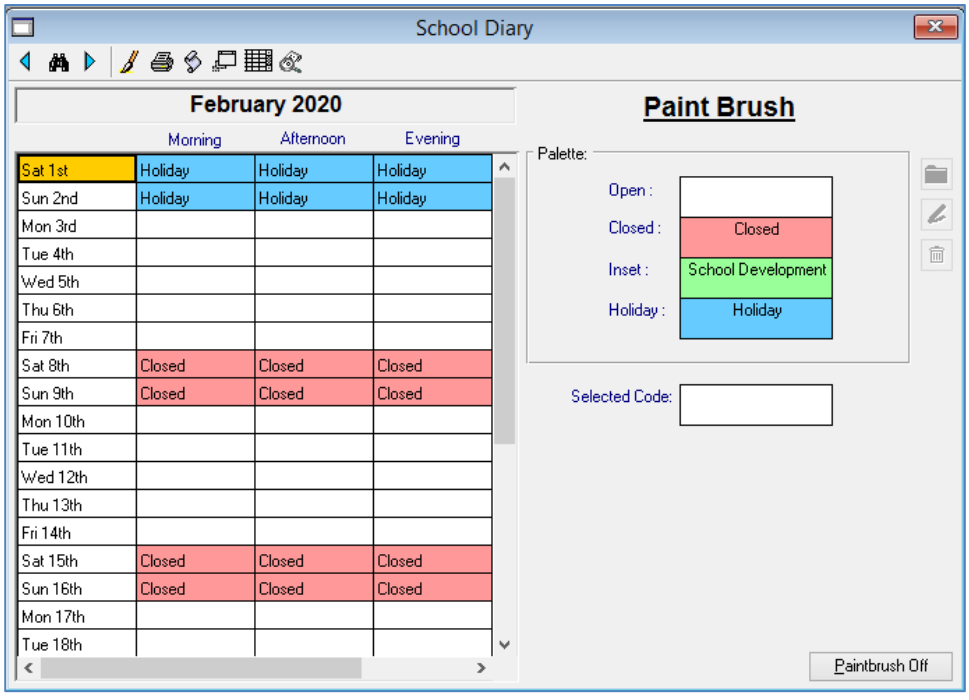
The Public Holidays for 2020 are:

PUBLIC HOLIDAY	DATE
New Year's Day	Wednesday 1 January
Australia Day Observed	Sunday 26 January Monday 27 January
Labour Day	Monday 2 March
Good Friday	Friday 10 April
Easter Monday	Monday 13 April
ANZAC Day	Monday 27 April
WA Day	Monday 1 June
Queen's Birthday	Monday 28 September
Christmas Day	Friday 25 December
Boxing Day	Monday 28 December

Once the terms have been set up, public holidays and school development days can be added.

Note: Whilst there are 2 School Development Days (SDD) prior to the student's commencing on Monday 3 February 2020, no SDDs will be marked in the School Diary. January will not appear in the School Diary.

- In the School Diary window click on the paintbrush
- Choose the relevant closure code from the right-hand side of the window and click on the day/session you wish to fill with the closure code colour.



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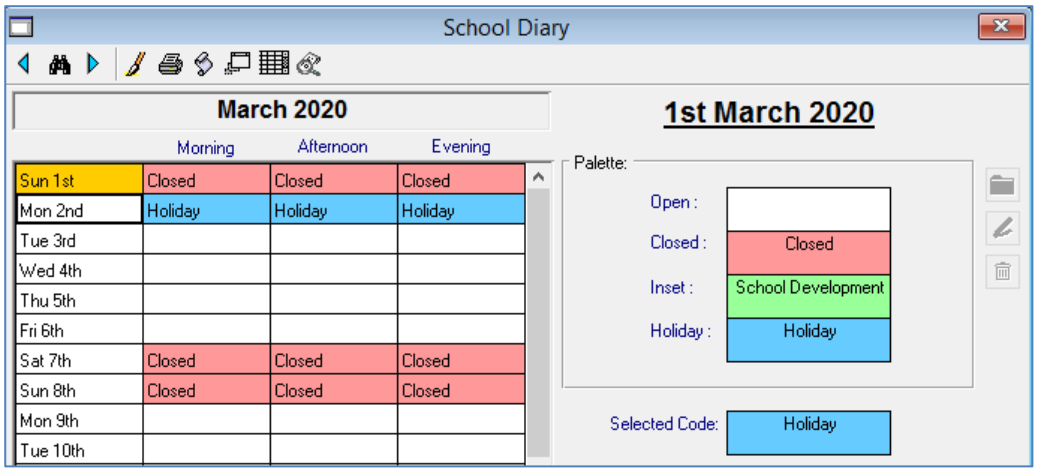
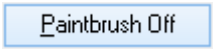
- Continue to enter all known School Development Days and Public Holidays



- Turn off the paintbrush 

- Close the School Diary window

Step 6: Defining Semester / Timetabling Periods

General > School Details > Timetabling Periods

Timetabling periods are required for Timetabling, and are used for calculating the number of student half day absences in Formal Reports. Terms dates must be entered in the School Calendar before Timetabling Periods can be created.

Selecting the S icon will create semester dates.

Selecting the T icon will create term dates.

Selecting will allow users to create customised Timetabling Periods. Schools using Timetabling will create the Timetabling Periods they require.

Define Semesters 1 and 2

- Click on Timetabling periods
- Ensure ***2020*** is selected
- Click on S to create semester periods
- Click on T to create timetabling periods

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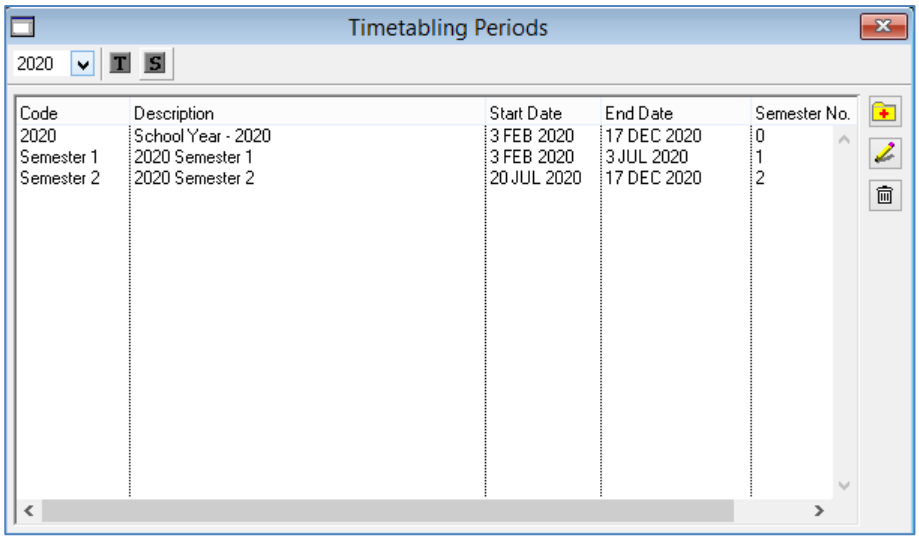

IMPORTANT

All start dates MUST be a Monday. If any start date is not a Monday, please call the Customer Service Centre on 9264 5555 (metro), 1800 012 828 (regional) or Customer.Service.Centre@education.wa.edu.au

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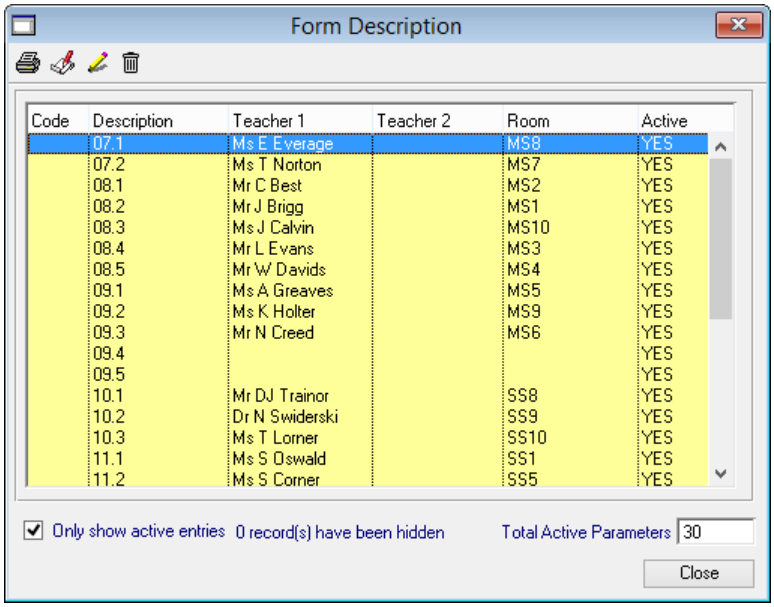
Step 7: Set up Form Descriptions for the New Year

IMPORTANT:

Do not add or edit teachers at this time. Teachers' names are added or edited once the current academic year has ended (See Step 20).

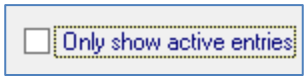
If you need to set up additional Forms for the following year:

- **Go to** General > Parameters > Form Description



The Form Description window displays forms for the current year. Any new forms (for the New Year) will need to be added now.

- Uncheck **Only show active entries** (there may be existing Forms marked as inactive)



- To reactivate an inactive Form
- Highlight the Form

- Click on the Edit Pencil
- Check the Active box

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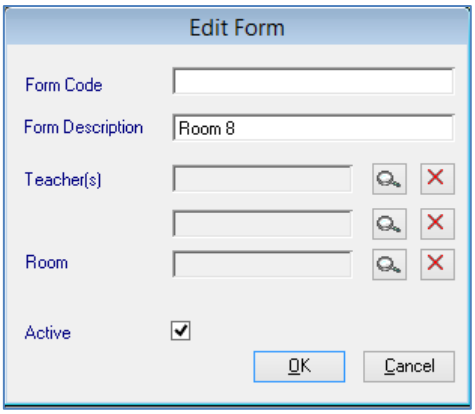
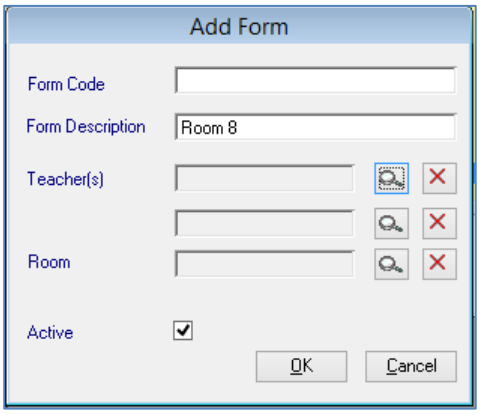


- Click ***OK***

- To add a new Form
- Click on the ***Add*** icon
- Add the new Form Description



- Click ***Ok***

- Repeat these steps to add any additional Forms
- Close the Form Description window

Note: Do not edit or delete the 'Not Specified' parameter. If there is no 'Not Specified' parameter in the list, contact the Customer Service Centre on 9264 5555 (metro), 1800 012 828 (regional) or Customer.Service.Centre@education.wa.edu.au before proceeding.

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Step 8: Set up Leavers

IMPORTANT

The processing of leavers is a TWO PART FUNCTION. The first part (Step 8) is where the Leavers' destinations and leaving dates are entered; the second step (Step 9) is where the Leavers are allocated to a proposed year and form and then moved to the Former Roll as part of the End of Year process.

Part One updates the leaving students' details.

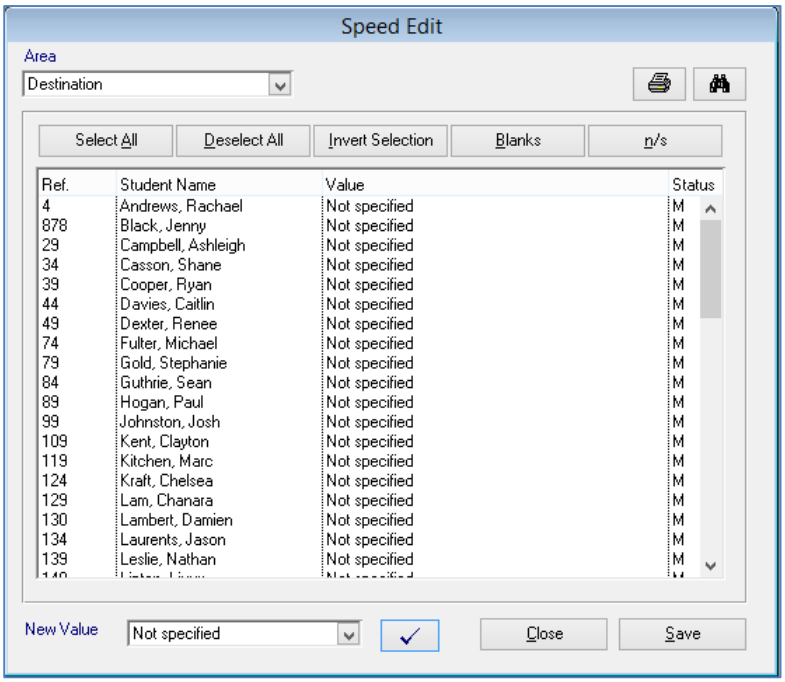
This specifies where they are going (Destination) and the date they are leaving (Leave Date)

Use ***Speed Edit*** to enter a ***Destination*** and ***Leave Date*** for your top year group and for ***all students who will not remain at the school***, for example, Year 6 students in a Primary School, Year 10 students in a District High School and Year 12 students in a Senior High School ***as well as any other students known to be leaving at the end of the academic year.***

Note: To ensure both Destination and Leave Date are saved correctly, ALWAYS process the Destination value first, followed by the Leave Date

Admin > Speed Edit

- Find the Year 12 students who will be leaving
- Select ***Destination*** from the ***Area*** drop down menu
- Select all of the students
- Select ***Not Specified*** from the ***New Value*** menu



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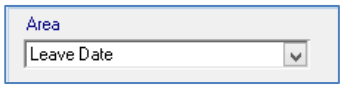
- Click to Apply Changes
- Click ***Save*** and ***Yes***

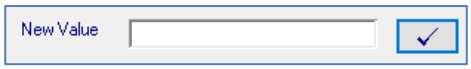
Note: Not specified should be used for Year 12 leavers only. All other leavers including Year 6 students going to Secondary School and Year 10 students moving from District High Schools to Senior Colleges must have their destination school entered. If the Destination is known, but is not in the list, contact the Customer Service Centre on 9264 5555 (metro) and 1800 012 828 (regional) or Customer.Service.Centre@education.wa.edu.au

- Select ***Leave Date*** from the ***Area*** menu



- Select all of the students

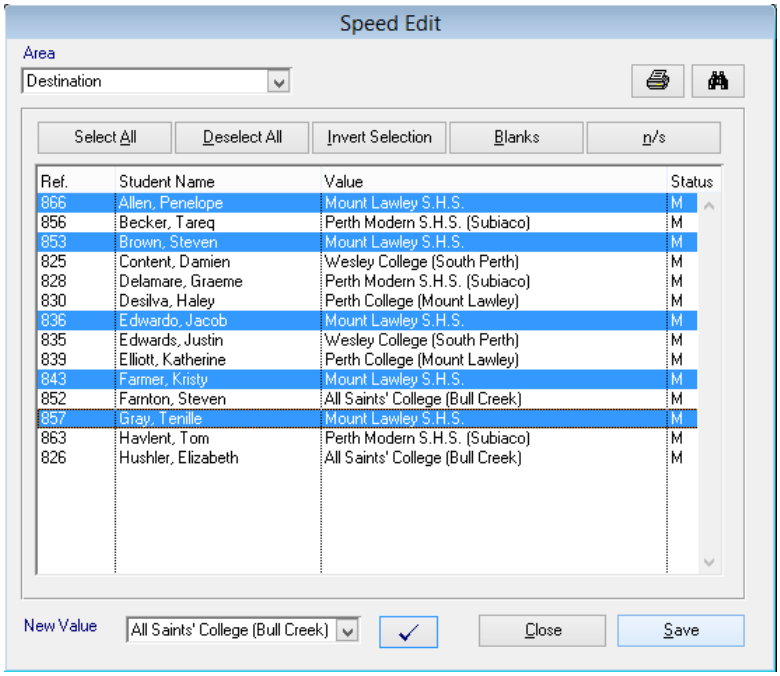
- Enter the leave date in the ***New Value***



- Click to Apply Changes
- Click ***Save*** *and* ***Yes***

Admin > Speed Edit

- Find the Year 6 students who will be leaving
- Select ***Destination*** from the ***Area*** drop down menu
- Select all the students with the same destination
- Select the appropriate destination from the ***New Value*** menu



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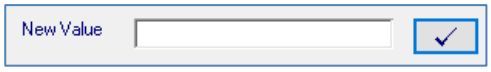
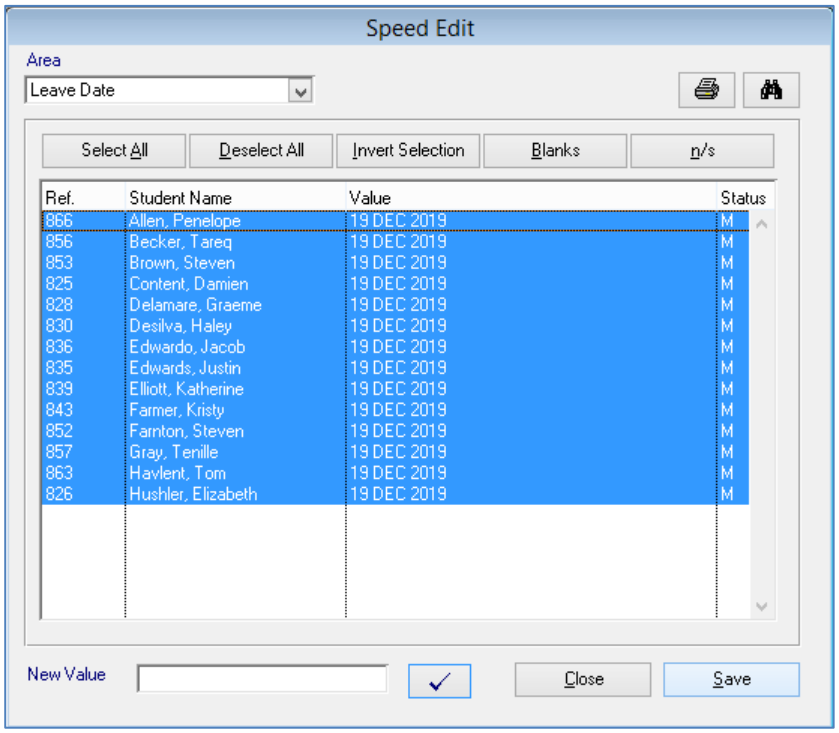
- Click to Apply Changes
- Repeat until all leavers have a destination
- Click ***Save*** *and* ***Yes***

Note: To ensure both Destination and Leave Date are correctly saved, ALWAYS process the change to the Destination first and then the Leave Date.

- Select the ***Leave Date*** from the ***Area*** menu
- Enter the leave date in the ***New Value***





- Click to Apply Changes
- Repeat until all leavers have a leave date
- Click ***Save*** *and* ***Yes***

PART TWO is the allocation of a proposed year and form (see Step 9) to leaving students which allows the EOY process to automatically move the leaving students to the Former Roll.

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Step 9: Increment Students' Proposed Years and Forms using the Year End Function

IMPORTANT:

Do not use speed edit to set up proposed Years or Forms.

The Year End function is available on the **Admin** side bar.

This function enables manipulation of the Proposed Year and Proposed Form fields. It is not final until completion of the Year End process.

There are three ways to increment the students who are moving up a year within the school:

1. Automatic Increment of Year Groups
2. Assign by Year/Form or
3. Assign Individuals to a Year/Form.

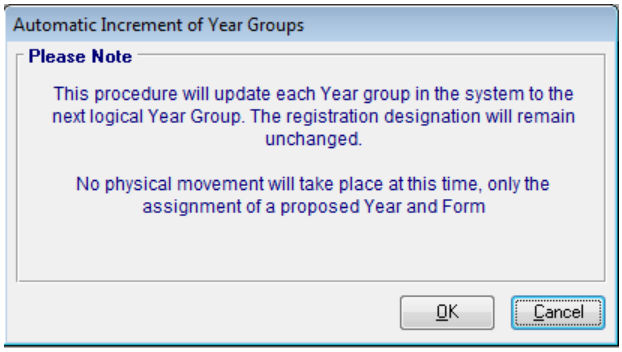
These functions are available through the Year End icon in the **Admin** sidebar.

Option 3 is recommended for most Primary Schools.
Option 2 is recommended for most Secondary Schools.

Option 1: Automatic Increment of Year Groups

Use this only if students keep the same class names but move up one year (for example, Year 3, Form Room 1 becomes Year 4, Form Room 1):

Admin > Year End > Automatic Increment of Year Groups



- Click ***OK*** to proceed

Note: Registration designation is equivalent to Form.

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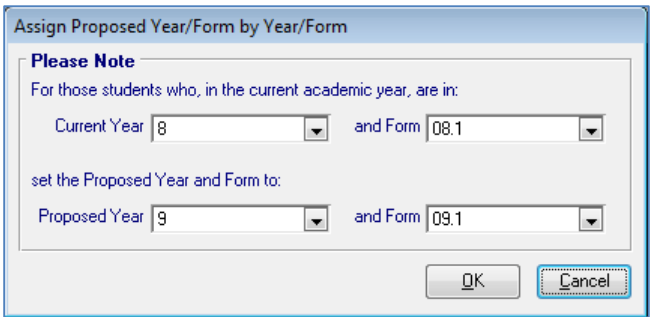
Option 2: Assign by Year/Form

Use this if groups of students' Years and Forms change (for example, Year 8, Form 8.1 becomes Year 9, Form 9.1):

Admin > Year End > Assign by Year/Form

- Enter a ***Current Year*** and ***Form***
- Enter a ***Proposed Year*** and ***Form***



- Click ***OK*** twice
- Repeat for all current Forms

Note: Do not use this function to process Leavers. For Leavers follow the process shown in Step 9 - Option 3.

Option 3: Assign Individuals to a Year/Form

The third option enables each Form to be allocated a proposed Year and Form, and it also allows for individual students within each Form to be assigned to a different Proposed Year/Form. It is important to allocate a Proposed Year and Proposed Form for Leavers.

Admin > Year End > Assign Individuals to a Year/Form

- Select the Current Year/Form to display the current students' names in the Modifications pane
- Highlight students to be allocated a Proposed Year Group and Proposed Form
- Select the Proposed Year Group and Proposed Form and click ***Update Line(s)***

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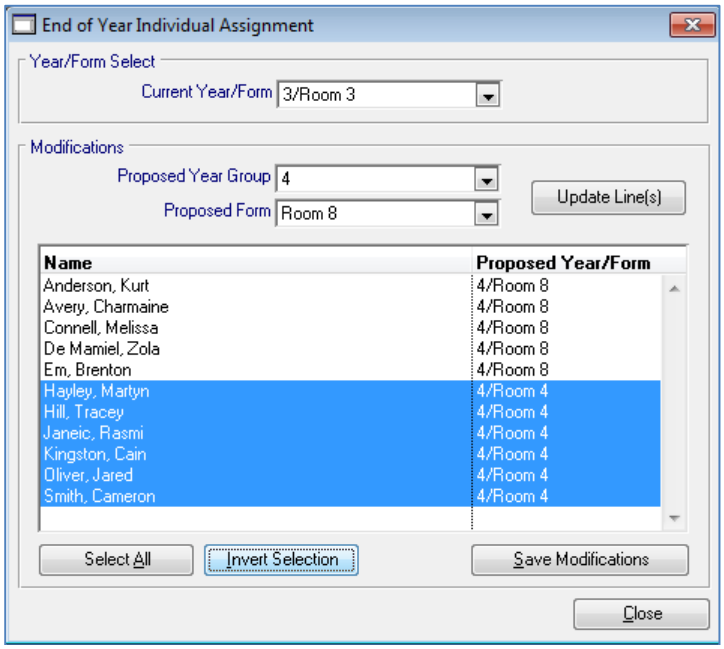

- Repeat until all students have a proposed year and form

***Note: To allocate all students to the same Year/Form, use the Select All button. To select several students, hold the <Ctrl> key and click on students' names in the list. To flag the Leavers, select* Leaver *in* Proposed Year Group *and* Not Specified *in* Proposed Form.**

- Click Save Modifications
- Repeat for each Form

Option 3 continued: Leaving Students

For students who are leaving the school at the end of the year, for example Year 12 students in a Secondary School, allocate a proposed ***Year Group*** of ***Leaver*** and ***Proposed Form*** of ***Not Specified***.

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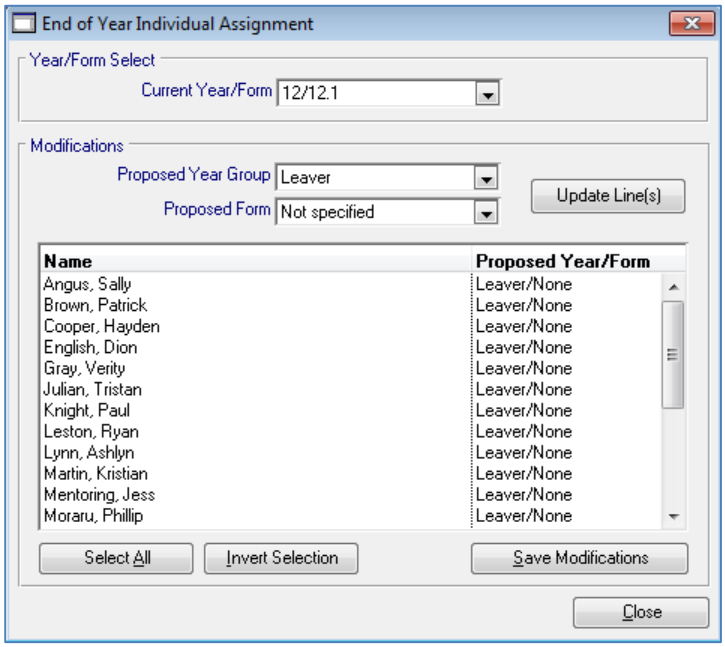
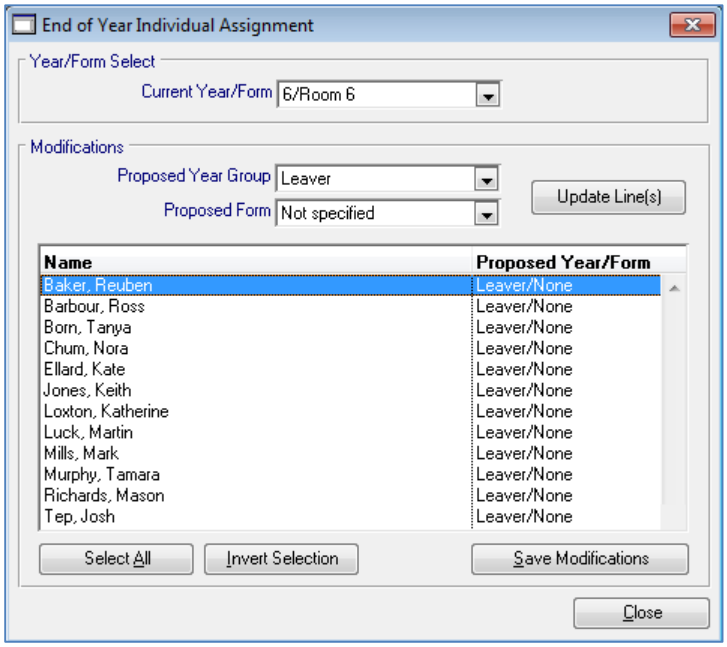


The data entered in the Year End function is simply ***Proposed*** Years and Forms. You can return to the Year End function and update the information as required.

Note: Remember to allocate Leaver and Not Specified to any student who has indicated they will not be returning in 2020. This includes Year 6 students moving to Secondary School.



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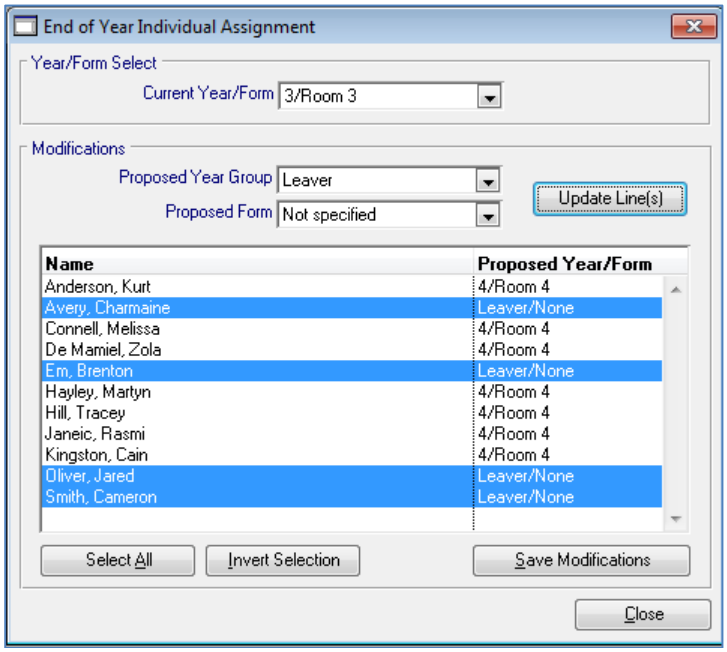
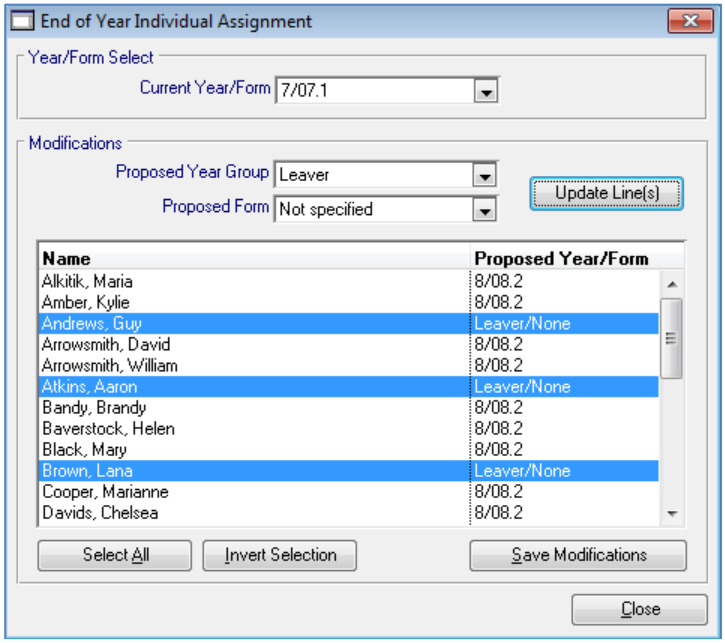
Note: Remember to allocate Leaver and Not Specified to any student who has indicated they will not be returning in 2020.





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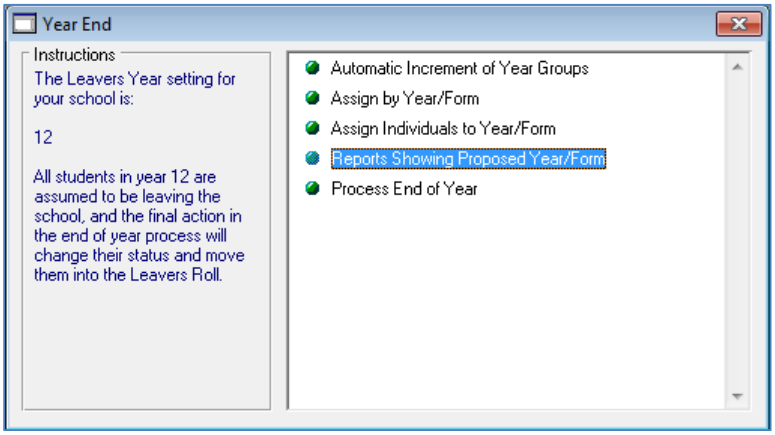
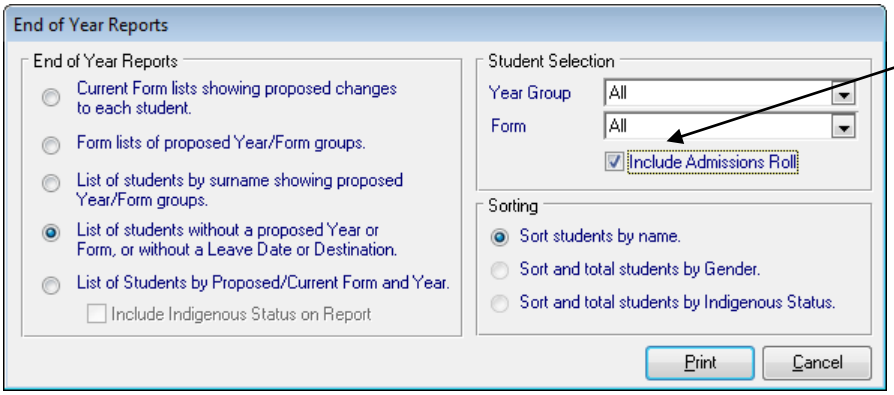
Step 10: Print Reports Showing Proposed Year/Form

Admin > Year End > Reports Showing Proposed Year/Form



- Choose the type of report you wish to print by clicking in the appropriate radio button



Reminders:
Include Admissions Roll.
Ensure Student Selection drop down boxes display Year Group-All and Form-All. This report cannot be printed for Individual Year Groups or Forms.

Note: It is recommended that you print the fourth option, a List of students without a proposed Year or Form or without a Leave Date or Destination. The report lists students who have no proposed year and/or form and/or Leave Date or Destination. If any have been missed, return to Step 9 and make the necessary changes before the End of Year is processed.

IMPORTANT

Students entered onto the Admissions Roll should be allocated to the Year and Form they will go into in 2020.

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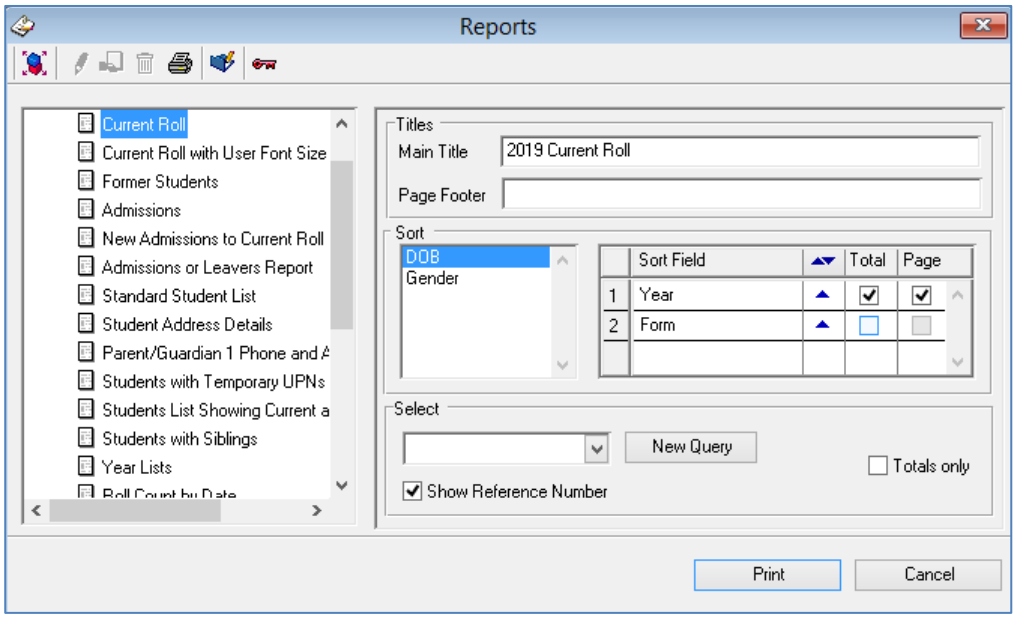
Step 11: Print Student Lists for Reference (Recommended)

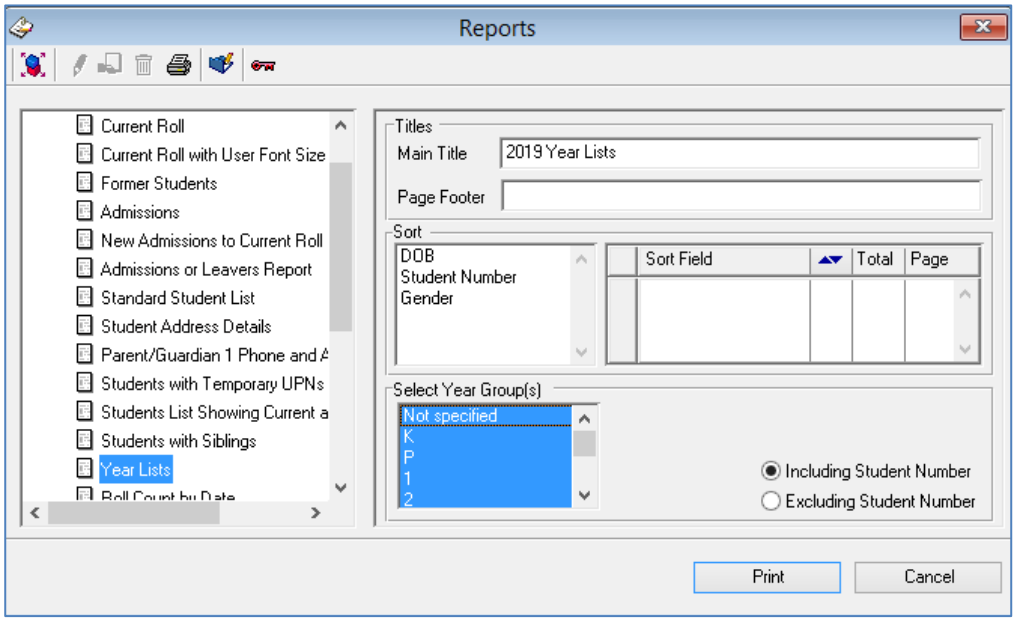
It is recommended that, for future reference, year and form lists for the current year are printed, including a Form List Summary before finally running Year End. Print all of the following reports, scan a copy and save to K:\Keys\Integris\Outbox.

Note: The system does not retain previous years' Forms once End of Year has been processed.

Admin > Reports > Roll Reports > Current Roll Report



Admin > Reports > Roll Reports > Year Lists Report



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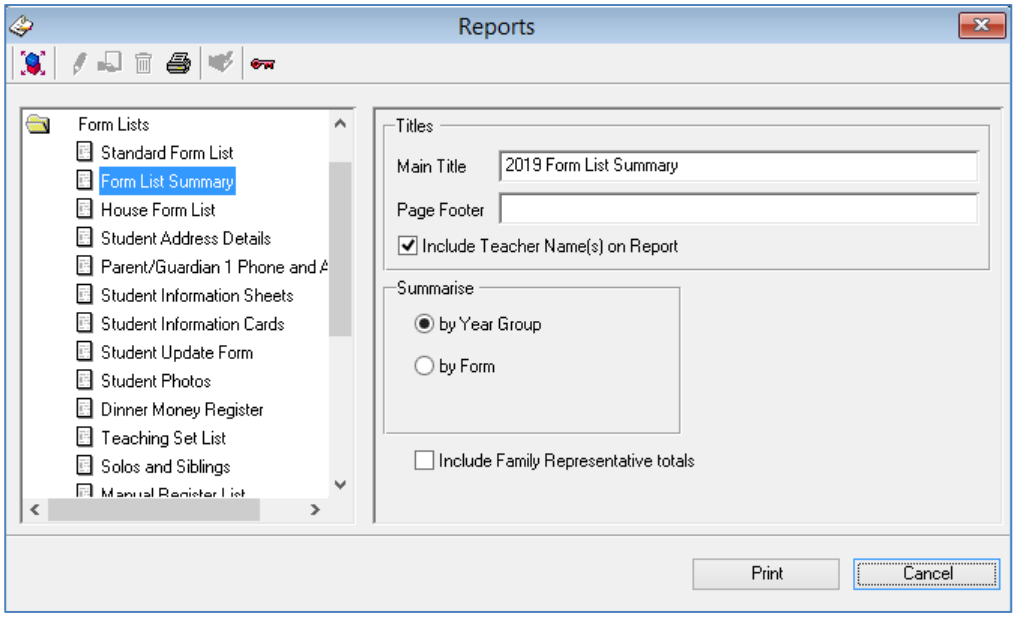
Admin > Reports > Form Lists > Form List Summary

This Report will display a summary of all Forms as well as a gender breakdown and family representative total (If selected).



Important: STOP HERE

At this point schools should stop their Year End processing. Steps after this point must only be completed once the attendance Year is completed for ALL students.

Note: Daily Records must be created AND attendance data entered for students' last day of attendance BEFORE you Process Year End.

Step 12: Back Up Datafile

IMPORTANT

Before proceeding to the next step, repeat the backup using the method outlined in Step 4. This needs to be done in Single User Lock.

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Step 13: Process Year End

IMPORTANT

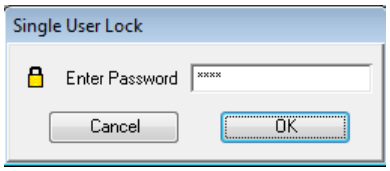
If you have transferred your Admissions Roll students to the Current Roll before processing Year End, please contact the Customer Service Centre on 9264 5555 (metro), 1800 012 828 (regional) or Customer.Service.Centre@education.wa.edu.au

This will move students to their new Year and Form groups and move the students who have been flagged as Leavers to the Former Roll. It is the school's decision whether to process End of Year after the end of the academic year or immediately before commencement of the new academic year.

Processing Year End should only occur when you are ready to roll over your student data. This process can only be carried out in Single User Mode.

- Ensure all other users are logged out of Integris

File > Single User Lock



- Type your password and click ***OK***

- Click ***OK***

Single User lock is now activated and the icon appears in the top tool bar

Note: Integris will not let you perform a Year End update if it finds any students without a proposed Form or Year group, or if any Leavers do not have a Leave Date or Destination. It will produce a report of those students for whom such data needs to be entered. See Step 10 for details.

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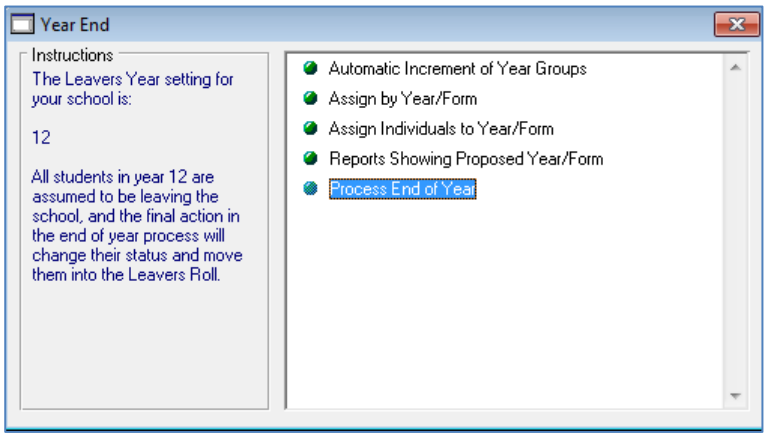
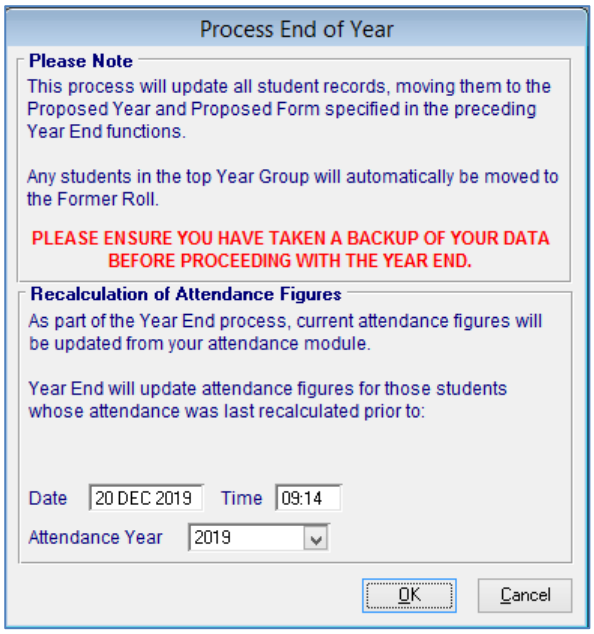
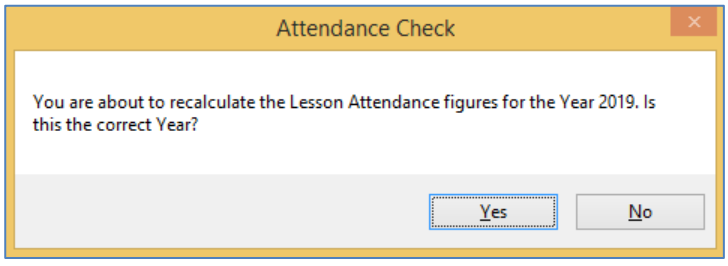
Admin > Year End > Process End of Year





- Select the correct attendance year - ***2019***
- Click ***OK***



- Click **Yes**

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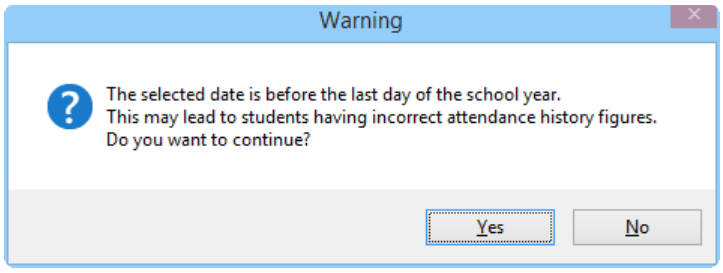
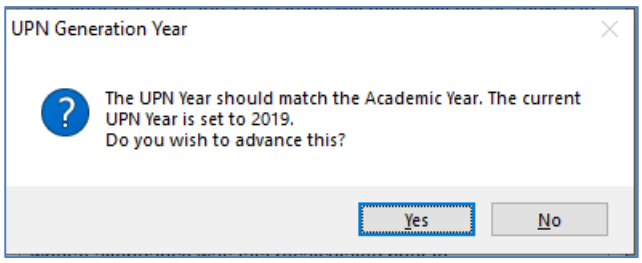
Note: If you attempt to process Year End before the end of the attendance year has been completed, the following message will appear. End of year should be processed after the end of the attendance year.



The processing of Year End may take some time. For example, processing may take from 10 to 45 minutes depending on factors such as processor capacity, student numbers and also whether the Lesson Attendance module is being used.

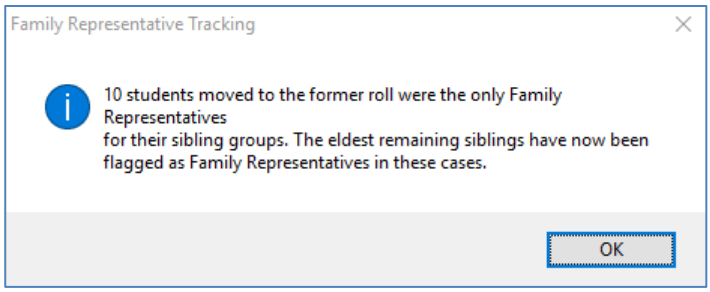
At the conclusion of this process the following message will be displayed:



The current UPN Year should be set to 2019. You will be asked if you wish to advance the current UPN to 2020.

Note: If the current UPN year is NOT correct in the message box, you will be able to continue processing the Year End, however after completing the Year End process, contact the Customer Service Centre on 9264 5555 (metro), 1800 012 828 (regional) OR Customer.Service.Centre@education.wa.edu.au for assistance in correcting the UPN.

- Click ***Yes*** to continue



- Click ***OK***

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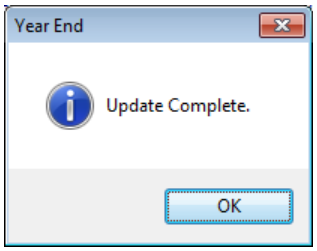
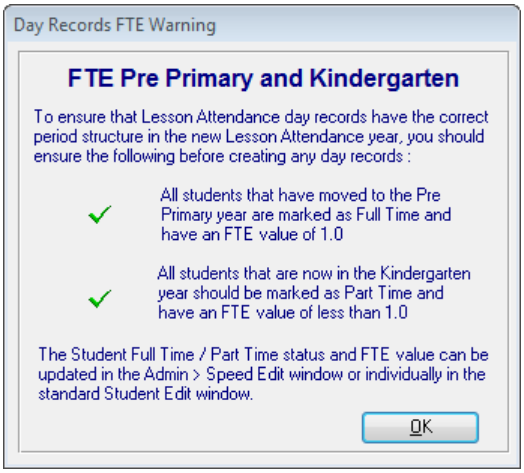


- Click ***OK***



At the completion of the End of Year process, schools will be reminded to check the FTE of their Kindergarten and Pre-Primary students and ensure that these are updated for the New Year.

- Click ***OK*** to finish

Step 14: Check Year End was Successful

Important

- Go to Student Details and find a student on the Current Roll
- Check that they are now in their new **Year** and **Form**. If not, contact Customer Service Centre on 9264 5555 (metro), 1800 012 828 for (regional) or Customer.Service.Centre@education.wa.edu.au, before continuing.

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Step 15: Process Admissions Students

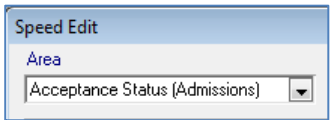
Adding students to the Admissions Roll (for example, incoming Pre-Primary students in a Primary School or incoming Year 7 students in a Secondary School) may be done at any time, but accepting them and transferring to the Current Roll should be undertaken ***after*** processing Year End. The Department of Education recommends that schools admit Admissions students to the Current Roll in the New Year, when you are more likely to know which students will definitely be attending the school.

If you are using the School-to-School Import function to import data for students from another Integris school, place the incoming students on the Admissions Roll *prior to the following steps*.

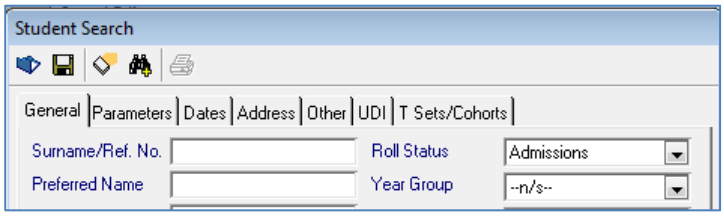
Note: It is advisable to be in Single User Lock when transferring Admissions Students to the Current Roll.

Admin > Speed Edit

- Choose the ***Area - Acceptance Status (Admissions)***



- Find students on the Admissions Roll who are to be moved to the Current Roll



- Select all of the students for whom you wish to update their acceptance status
- Check ***New Value***

- Click to Apply Changes

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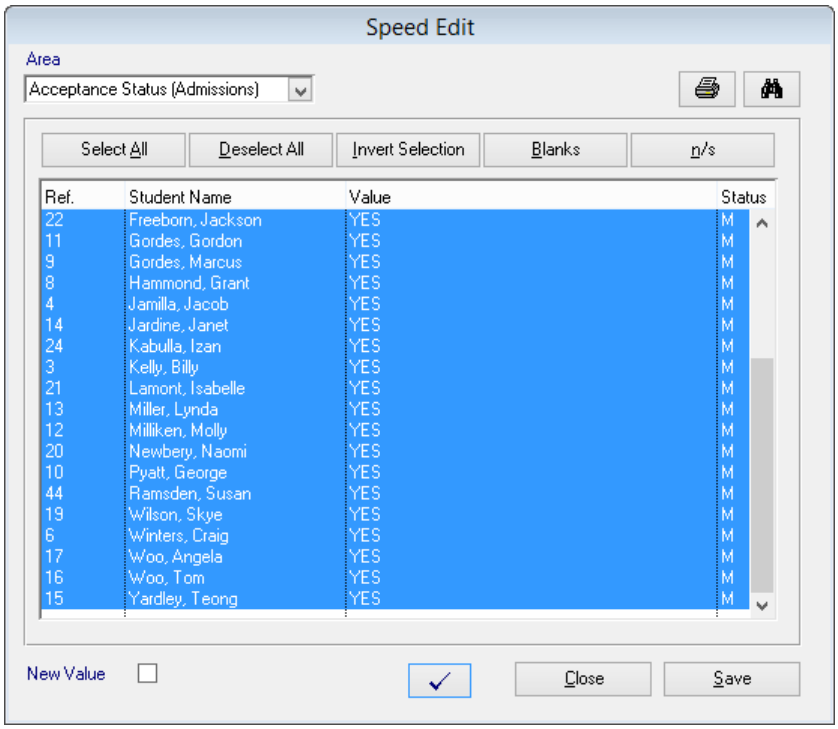
Details are changed and ***M*** (Modified) is displayed in the Status column.

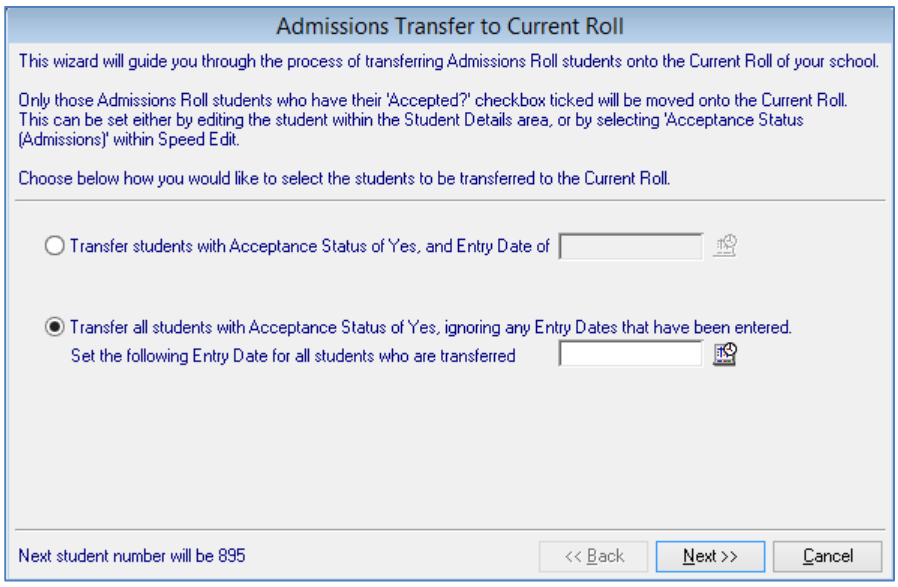


- Click ***Save*** and ***Yes***

Note: If Admissions records are being edited at the time of transfer to the Current Roll, the record/s in use by other users will not be brought onto the Current Roll. A message will appear to notify the user of the number of records not transferred to the Current Roll.

This is not a single user mode function. However, it is advisable to use Single User Lock when performing the transfer of Admissions students to the Current Roll.

Admin > Admissions > Admissions Transfer to Current Roll



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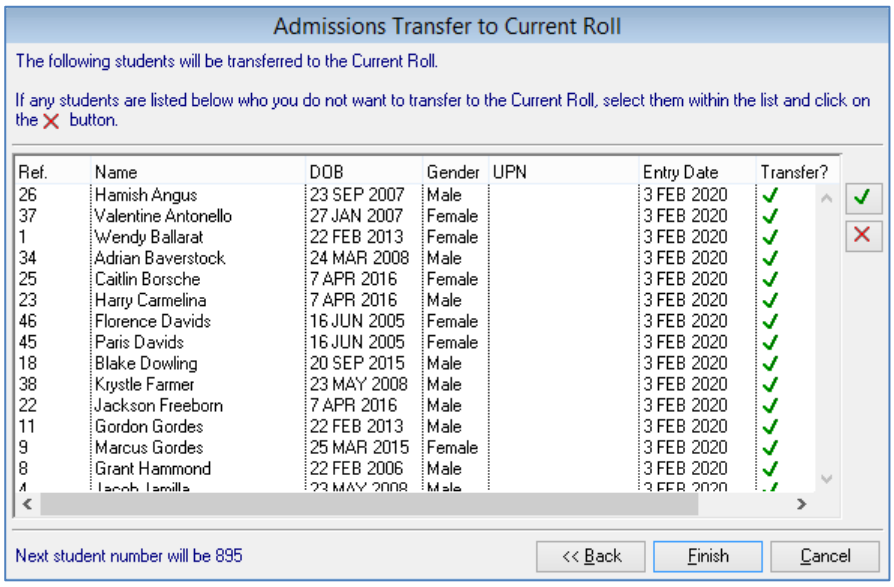
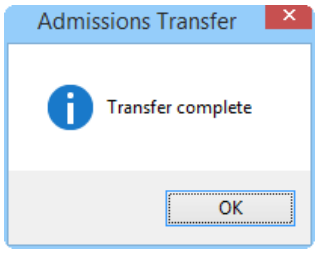
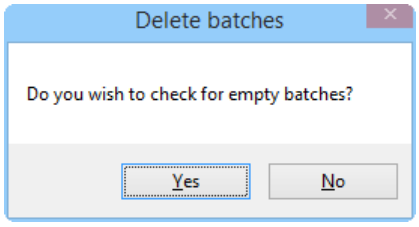
- Select the option ***Transfer all students with Acceptance Status of Yes, ignoring any Entry Dates that have been entered***
- Set the Entry Date to the date of the students' first day of attendance at the school
- Click ***Next***



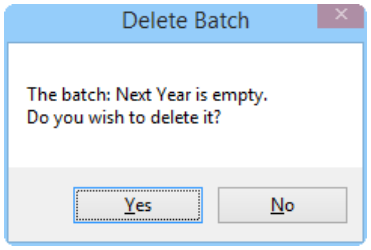
- If there are any students who should not be transferred, highlight their names and click ✕
- Click ***Finish***



- Click ***OK***
- If prompted you may wish to check for empty batches



- Click Yes to delete any empty batches



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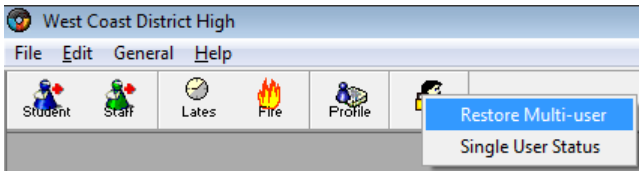
- ***Restore Multi-user*** if you have engaged the Single User Lock function so that other users can logon to Integris again.

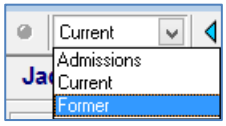


Step 16: Reinstate Returning Students from the Former Roll to the Current Roll

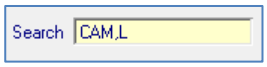
Where students have a Former Roll record but are returning to your school, they need to be reinstated to the Current Roll. Schools should always check whether any new enrolments have a Former Roll record and use this reinstating process to move them to the Current Roll.

General > Student Details

- Select the Former Roll from the drop down list



- Locate the Student required



Note: The student record will show the Year and Form the student was in when they left the school. This must be reviewed as it is likely the student will be in a different Year and Form when returning to the school. This can be edited before reinstating the students, or during the reinstating process. Students can only be reinstated to the original roll.

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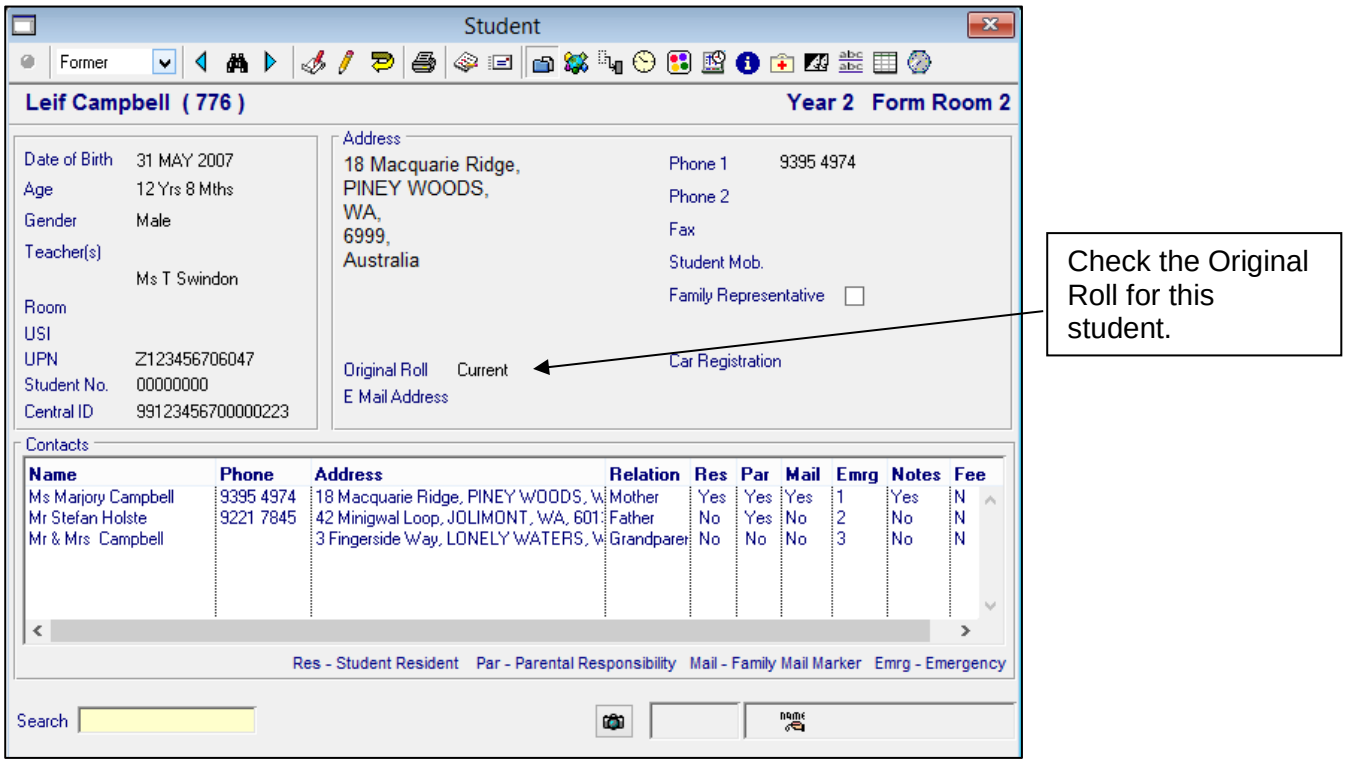
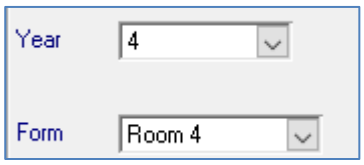


Check the Original Roll for this student.

Editing the Year and Form prior to the reinstatement process is done in the same way as editing any other student record.

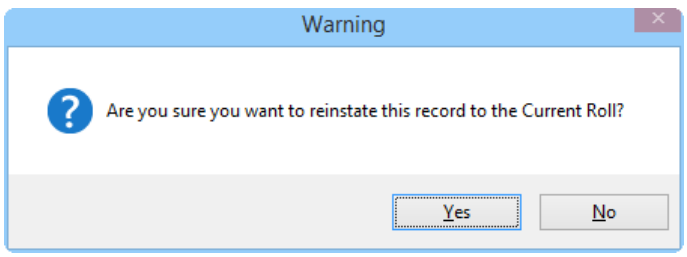
- Click edit
- Change the Year and Form on the Personal Tab



- Click OK to save

To reinstate a student to the Current Roll:

- Click Reinstate Student to Original Roll
- Click Yes to the Warning message



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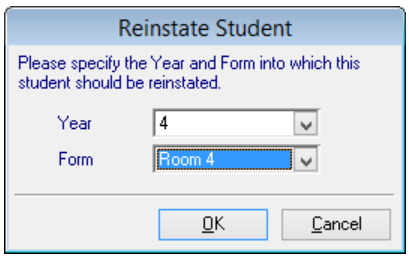
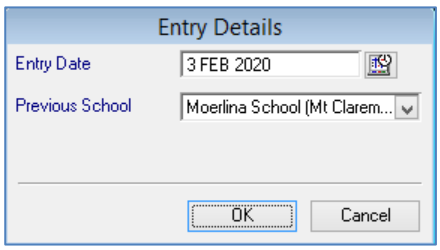
- Check the Year and Form the student is going to re-enter. If this has been updated by editing the record click Yes. If the record has not been edited click No
- Enter the new Year and Form and click OK

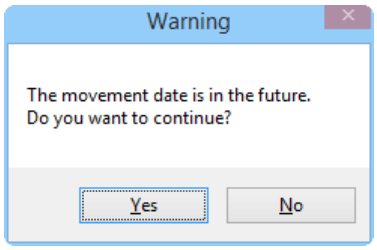


- Add an Entry Date and select the student's Previous School

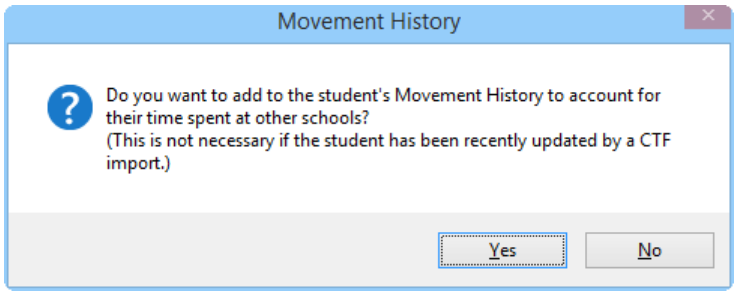


- Click OK

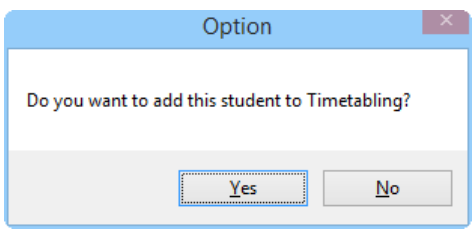
If the Entry Date is in the Future, a warning message will display.



- A Movement History record can be created by this process if required



- Add the Student to a Timetabling Cohort if required or click No for Primary students



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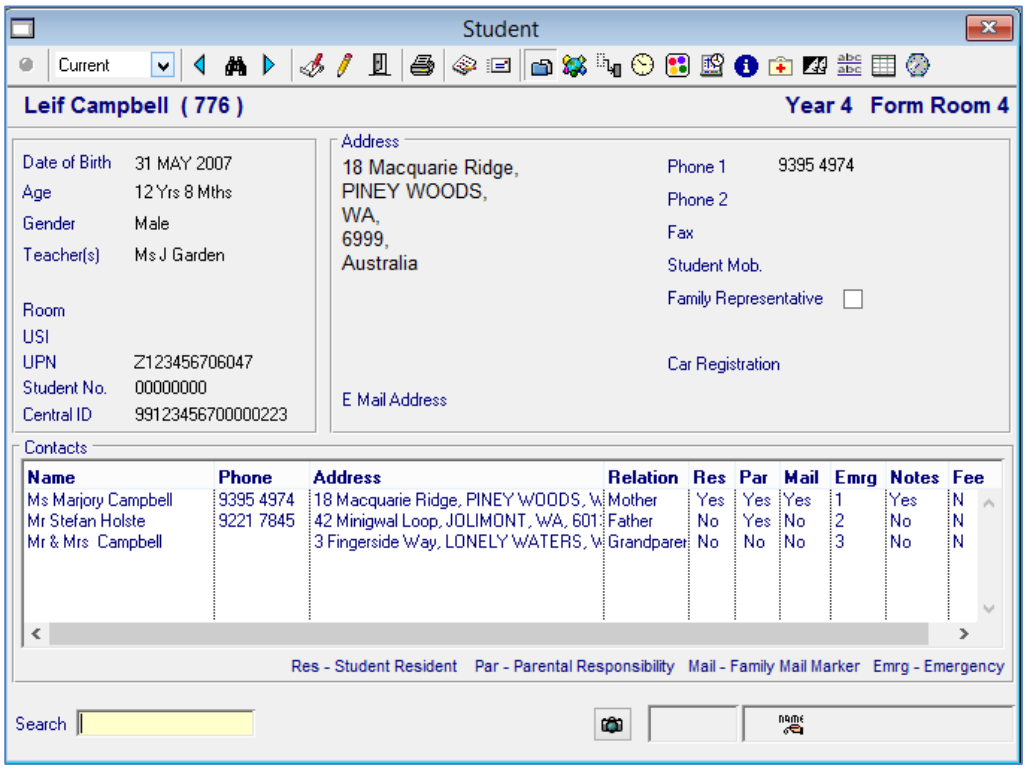
The student will be reinstated to the Current Roll in the new Year and Form selected.



IMPORTANT:

Ensure all the student's information is updated after reinstating them. Contact information as well as other personal information (e.g. medical and immunisation details) may have changed since the student was last enrolled at the school.

Step 17: Move External Students to the Former Roll

Note: Community Kindergarten students enrolling in pre-primary for 2020 should be moved to the current roll.

If the school has students on the External Roll who are not returning to the school in 2020, they should be moved to the Former Roll using the utility in ***Admin > Utilities > External Roll to Former Roll***

Edit existing External Roll Students and add a Leave Date. This can be done in ***Admin > Speed Edit*** if leave dates need to be added for multiple students.

General > Student Details

- Select the External Roll

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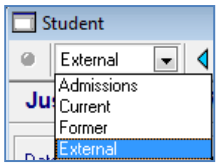
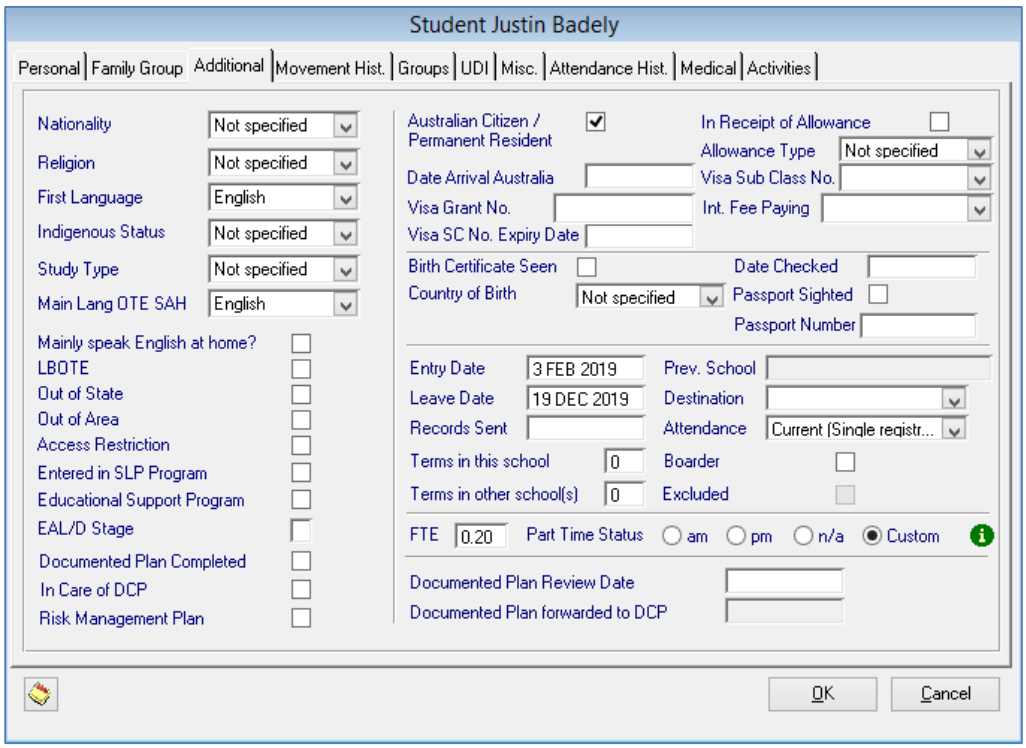
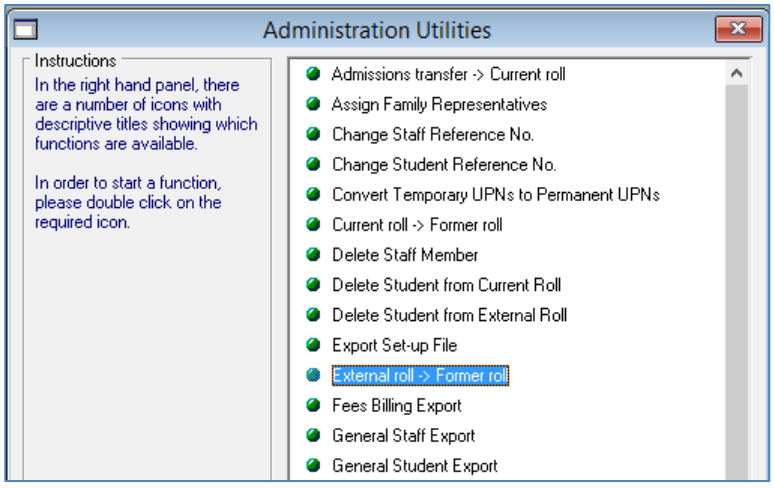


- Add a Leave Date on the Additional tab and click **OK**



Run the External Roll to Former Roll Utility

Admin > Utilities > External Roll to Former Roll



- Double Click on the ***External Roll > Former Roll*** utility

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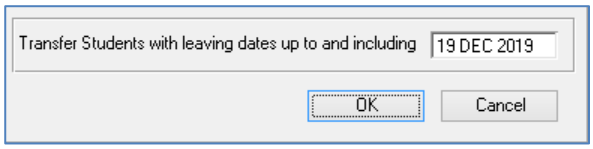
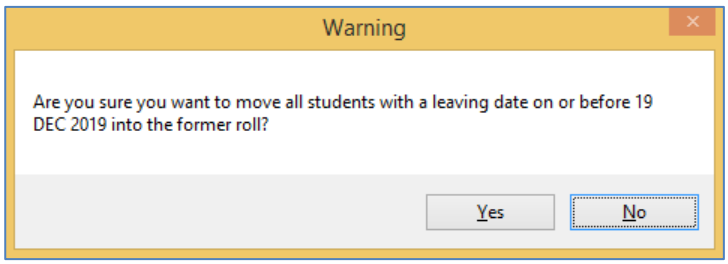
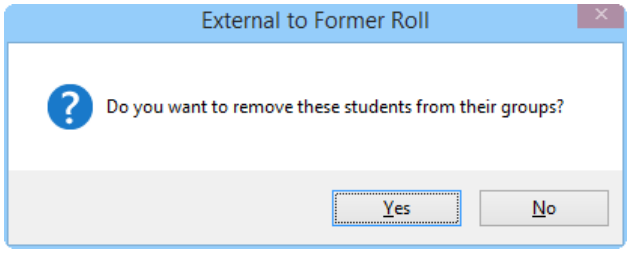
- Enter the Leave Date and Click **OK**



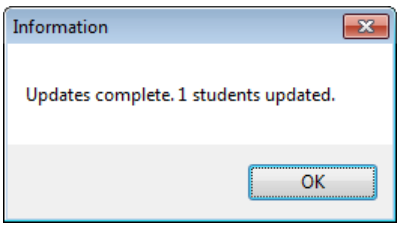
- Click **Yes** to the Warning message



- Click **Yes** if prompted to remove students from their groups



- Click **Yes**



- Click **OK** to the Updates Complete message

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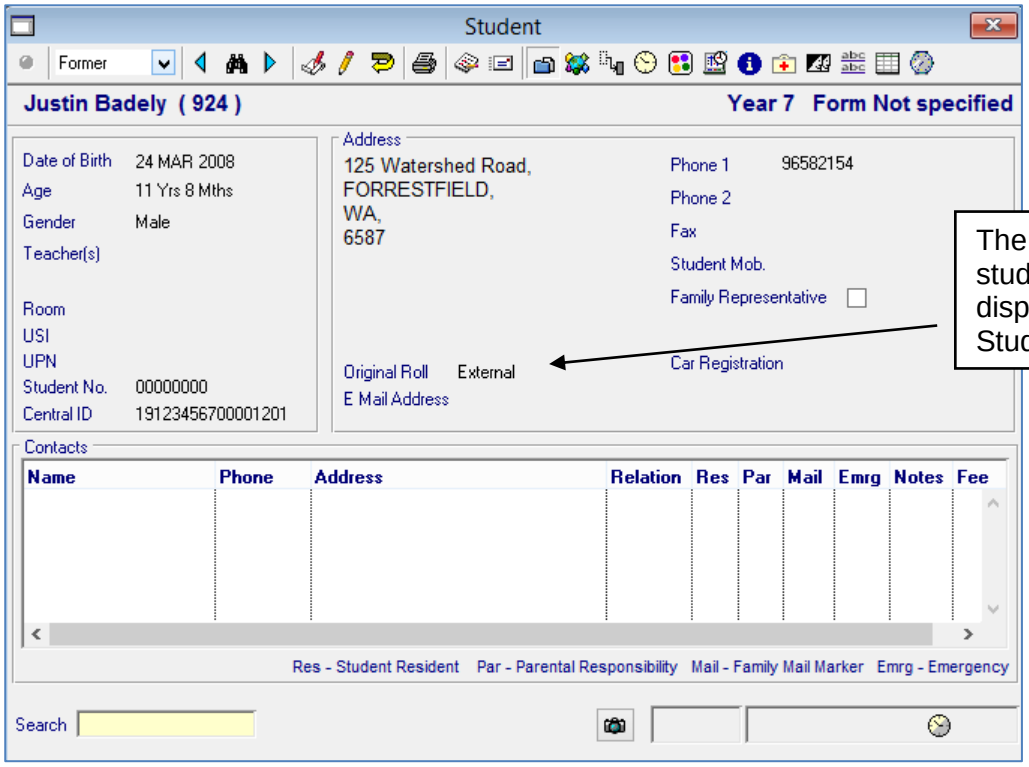
View the Students on the Former Roll.

General >Student Details



The Original roll where the student was enrolled is displayed for Former Roll Students.

Step 18: Changing Student FTE

Ensure all students have a valid FTE including any part-time Secondary students.

- All Kindergarten (Year K) students must have an FTE value of either 0.40 (standard), 0.50 or 0.60 if your school is participating in the Universal Access program.
- **All Pre-Primary and Primary students (Years P – 6) must have an FTE of 1.00. See example on Page 50.**
- Ensure that any Secondary students undertaking a part-time program have their FTE checked. The FTE for any part-time Secondary student should be greater than 0.00 and less than or equal to 0.90. All other Secondary students are full-time and should have an FTE of 1.00.
- All Secondary students less than 15 years old should have an FTE of 1.00.

If you find any Kindergarten (K) students who have been entered with an FTE of 1.00 these students must have their FTE changed to 0.40, 0.50 or 0.60. As the system will determine this is a change to part-time status, indicators for AM, PM, N/A and Custom will become available. Kindergarten students should be assigned an attendance pattern using the Custom option.

Note: If schools need assistance setting up attendance patterns for part-time students, please refer to the Part Time FTE Allocation fact sheet. *Part Time FTE Allocation fact sheet*.

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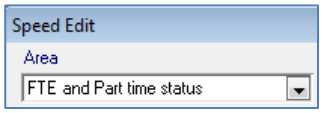
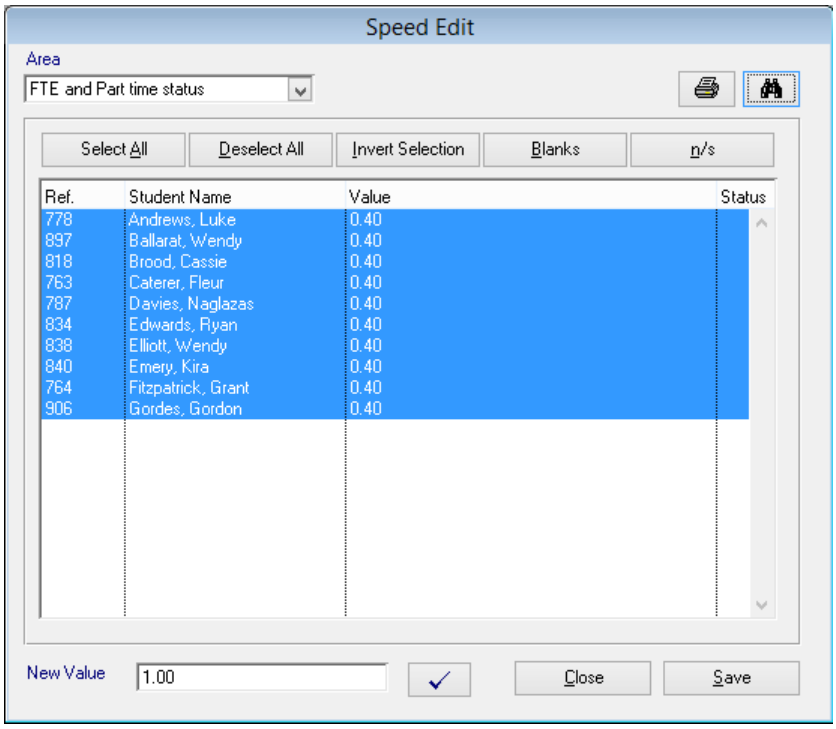
The example below demonstrates how to check and update the FTE for Pre-Primary students who were Kindy students during 2019.

Admin > Speed Edit

- Select the ***Area*** – ***FTE and Part time status***



- Find Pre Primary students
- Click ***Find***, ***Select*** and ***Yes***
- Select the students who do not have an FTE of 1.00
- Enter a ***New Value*** of ***1.00***



- Click to Apply Changes

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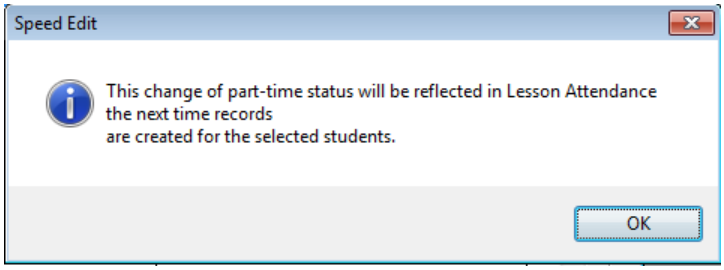
Note: Changing a Student's FTE affects the student's attendance.

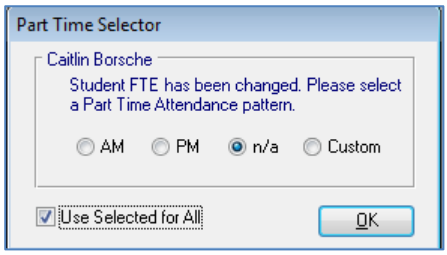
- Repeat the steps above to set the ***FTE*** for the Kindergarten students at ***0.40, 0.50*** or ***0.60***
- Click ***Save***

If the school is using the Lesson Attendance module, the following message will appear when you change a student's FTE:



- Click ***OK*** and ***Yes*** to save the modifications

When a student's FTE changes from full-time to part-time a dialogue box will request a pattern of AM, PM, n/a or Custom.



- Do not select AM or PM, check the ***n/a*** and check ***Use Selected for All***
- Click ***OK***

If schools know the half-day attendance patterns for the 2019 part-time students, use the ***Custom*** option to mark the attendance pattern for the student(s) concerned. When more than one student with the same attendance pattern has been selected via Speed Edit, click ***Use Selected for All*** and then click ***OK***.

- Select the ***Custom*** radio button
- Click the periods the student(s) will not be attending
- Click ***Use Selected for All***

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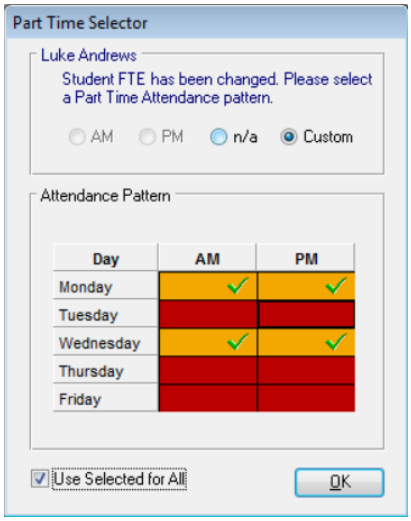
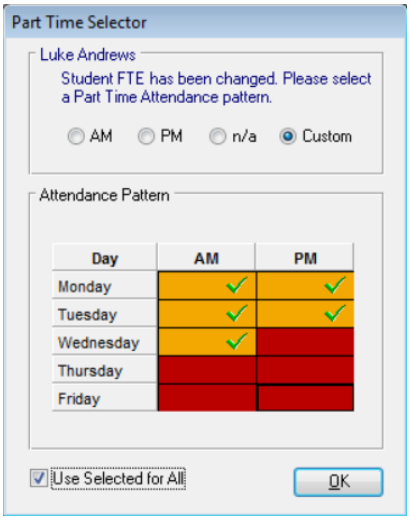
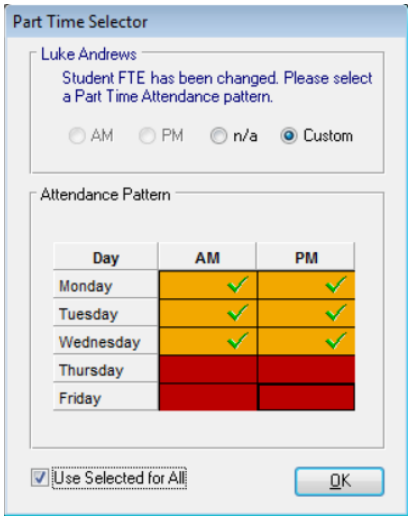
0.40 FTE Example	0.50 FTE Example	0.60 FTE Example or 0.50 FTE (10 day cycle-see below)
		

- Click ***OK***

IMPORTANT:

If students are attending 0.50 but have an attendance pattern of 3 days in one week and 2 days in the second week, the attendance pattern should be entered as 3 days. Refer to the Fact Sheet 'Creating a 10 Day Cycle for Kindy Students' at the link below to set this up. This must be done before creating Daily Records in Lesson Attendance.

The Enforced School Closure function is used to close the school for Kindy students on the days when these students are not due to attend. This can only be set up after the New Attendance Year has been created (see Step 24).

Note: It is recommended that the Enforced School Closure function is applied on a weekly/fortnightly basis to ensure all new Kindy enrolments are taken into account when closing the school.

Note: Attendance Records must be created daily so that absences can be entered into SIS. It is recommended that this is done before classes commence each school day or late each afternoon for the following day. This task will generally only take a few seconds.

Refer to SIS Classic Lesson Attendance for further information

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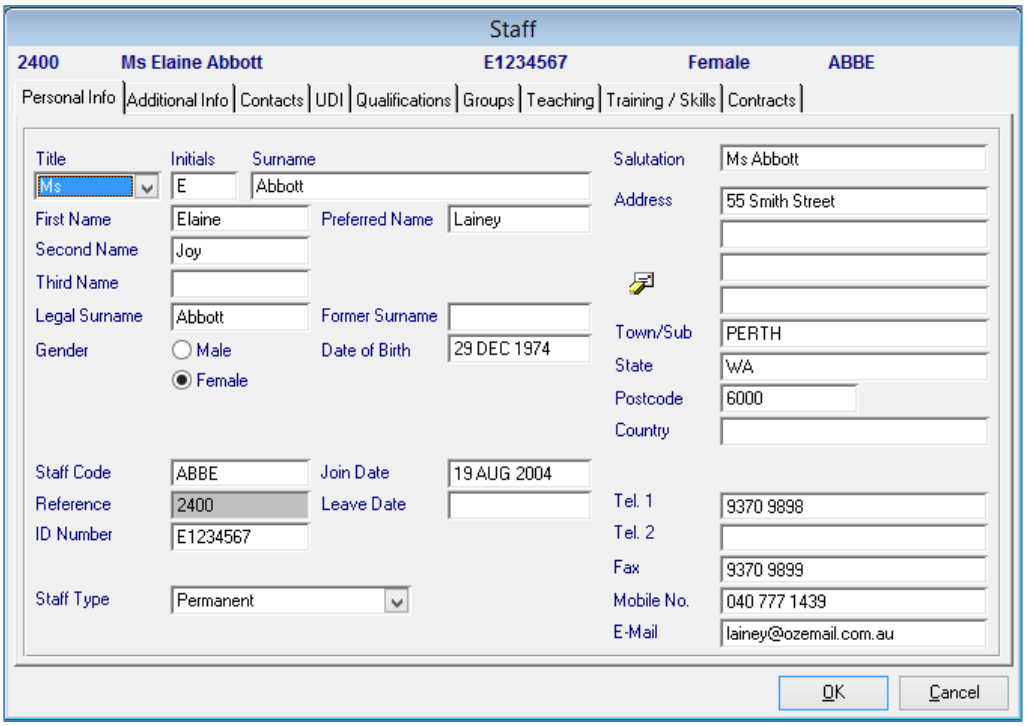
Step 19: Update Staff Details

When managing staff accounts for the new year, the following actions should be undertaken.

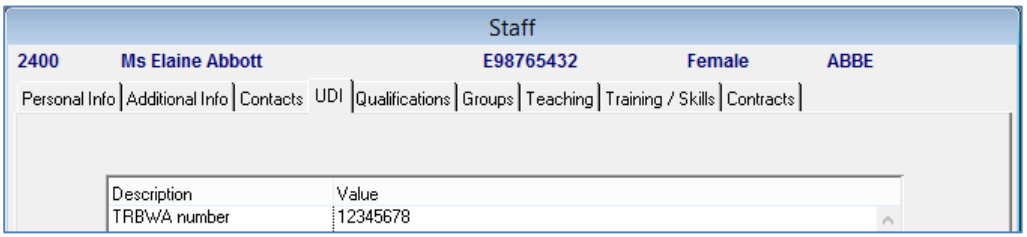
19.1 Add New Staff

General > Staff Details

- Click add and enter new staff details



Note: There are mandatory fields required for completing staff details entry such as* Surname, First Name, Date of Birth, Staff Code, ID Number *and* TRBWA number. *It is also advisable to include a Title and* Staff Type. *The TRBWA* number *is entered on the* UDI *tab



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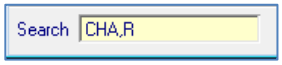
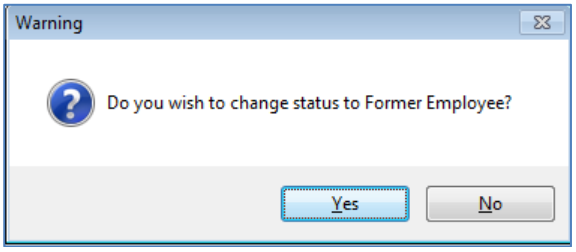
19.2 Move Staff who have left to the Previous Employee Roll

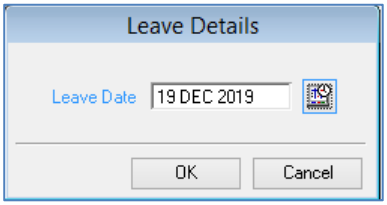
General > Staff Details

- Search for a staff member who has left 

- Click Move Entry to Previous Employee Roll



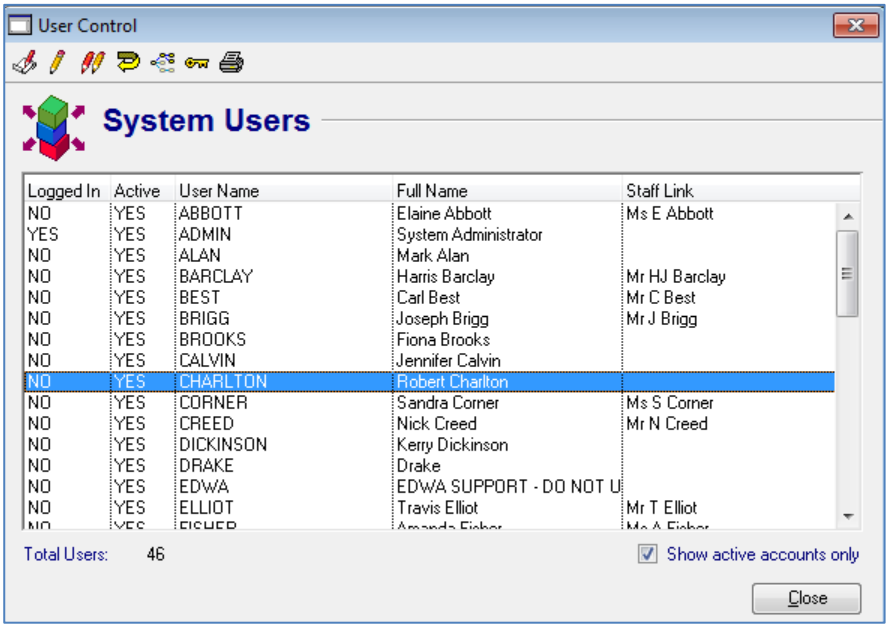
- Click ***Yes***



- Enter a ***Leave Date*** and click ***OK***
- Repeat for other staff who have left

19.3 Flag Staff who have Left as Inactive Users

General > Control > Users



- Select a staff member who has left and click Edit
- Uncheck ***Active***

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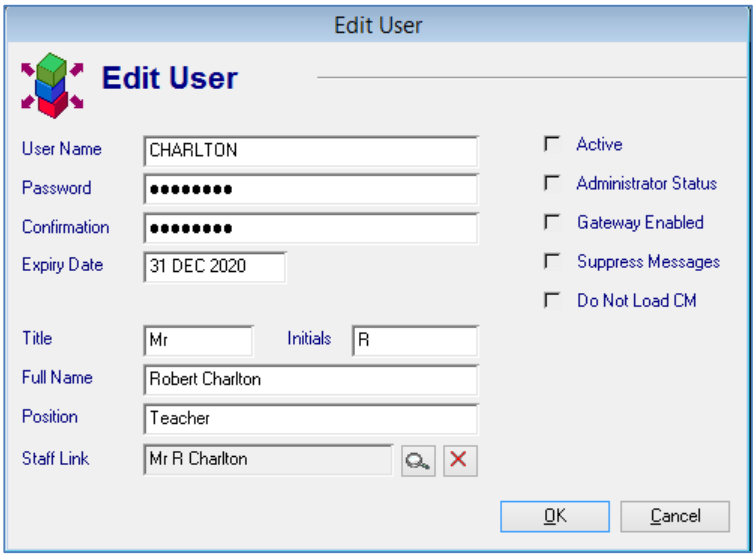


- Click ***OK***
- Repeat for other staff who have left

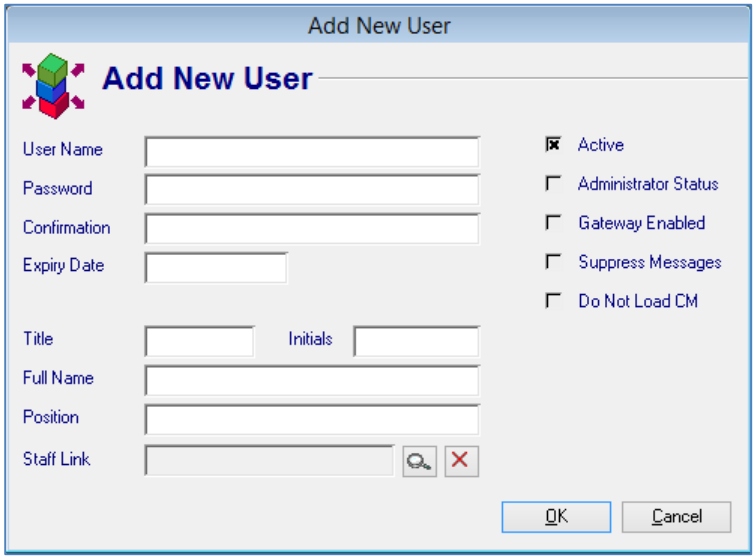
19.4 Add New Users and Assign Access Rights

General > Control > Users

Once a staff member has been added through **General > Staff Details** , appropriate access levels will need to be assigned in order for the staff member to log in and use the system.

19.4.1 Adding new staff details

- Click on the Add button in **Control > Users > User Control** window



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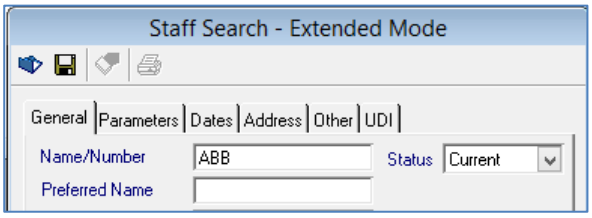
- Enter the name of the staff member. This is the name they will use to log on **<Tab>**
- Enter the password the staff member will first use to log on and then press **<Tab>**
- Confirm the password and **<Tab>**
- Enter the date on which you wish the password to expire
- Enter the staff member's title **<Tab>**
- Enter the staff member's initials **<Tab>**
- Enter the staff member's full name **<Tab>**
- Enter the staff member's position **<Tab>**

If the new user is a teacher, his or her account must be linked to the information entered in Staff Details.

- Click Find Staff Member
- Enter the first three letters of the staff member's surname in the ***Name/Number*** field

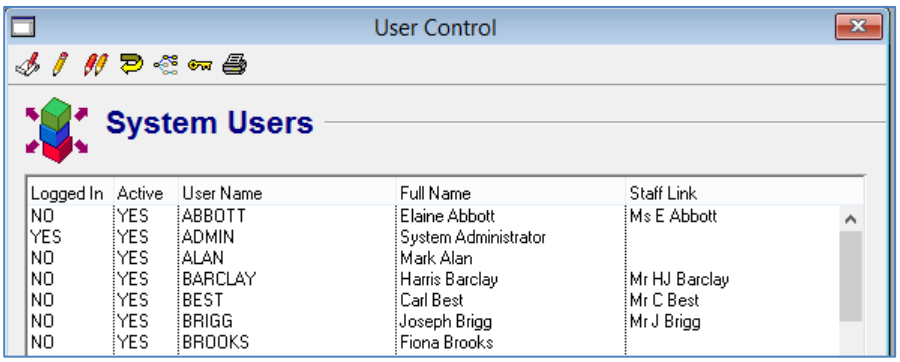


- Click ***Find***

- Click ***OK***

19.4.2 Assign Access Rights

- Double click on the staff member's name in the ***System User*** window



- The ***Access Control*** window will open displaying the list of modules the school uses
- Open the selected folder and highlight the component required

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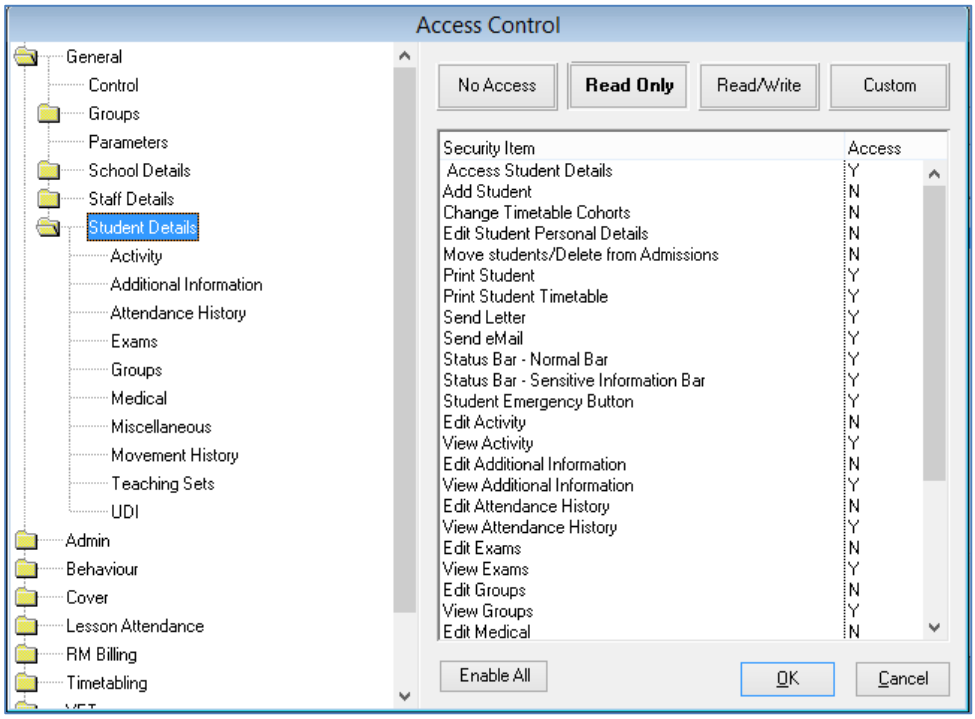
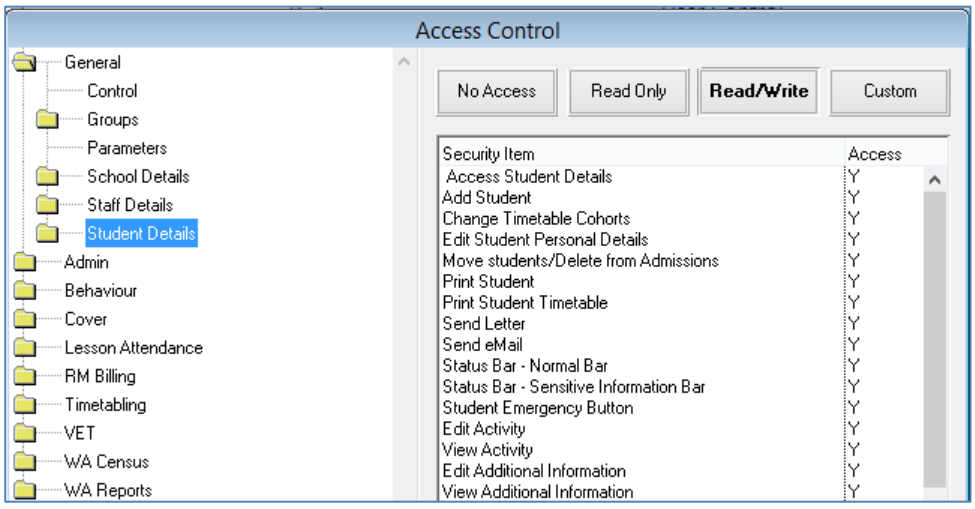


- Double click on an item to change the user's access rights

- Alternatively, click to enable all items within the component



- Click ***OK***

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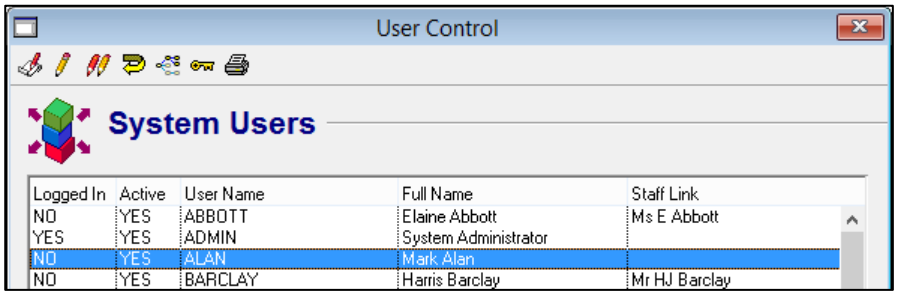
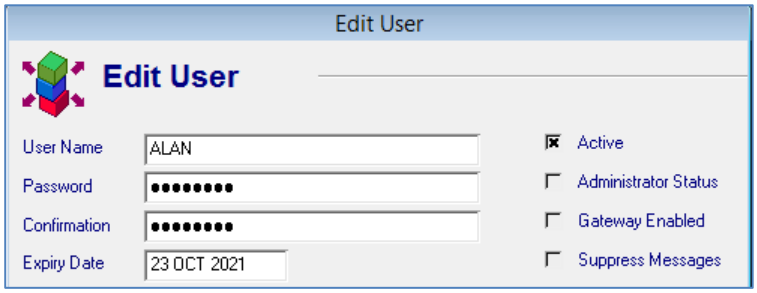
19.5 Edit Expiry Dates for Continuing Users

General > Control > Users



- Select a staff member who's account needs updating and click Edit
- Enter a new ***Expiry Date***



- Click ***OK***
- Repeat for other members of staff

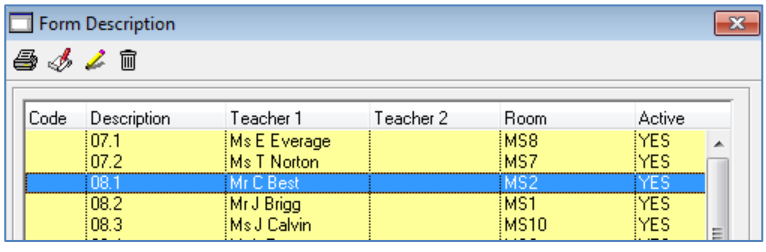
Note: It is recommended that the expiry dates are not set for the very end of the year, or the very beginning of the new year, as these are times when office staff are very busy.

Step 20: Update Form Descriptions

If you have new staff members, add them in **General > Staff Details** before continuing.

General > Parameters > Form Description

- Select the first Form Description to be edited



- Click Edit

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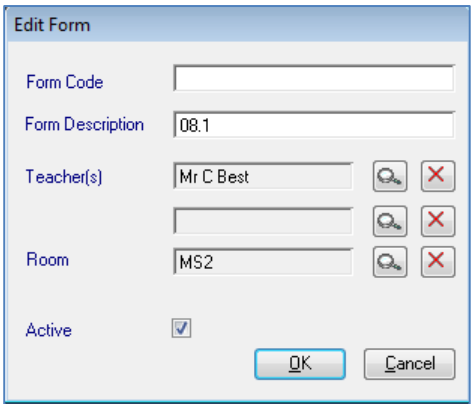
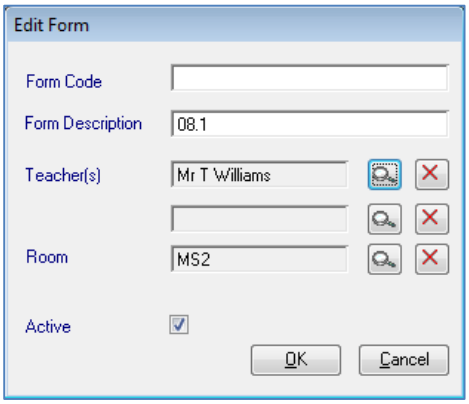


- Click **Find Form Teacher**

Note: Remove Link to Teacher ***will remove a teacher's name.***

- Find the new Form Teacher

The new teacher's name will be displayed in the ***Edit Form*** window.



- Repeat for a second Form Teacher where appropriate.
- Add a Room where appropriate.

Note: If no rooms appear in the Room Search window, room descriptions will need to be added to General > Parameters > Rooms.

- Click ***OK***
- Continue editing Form Descriptions as required

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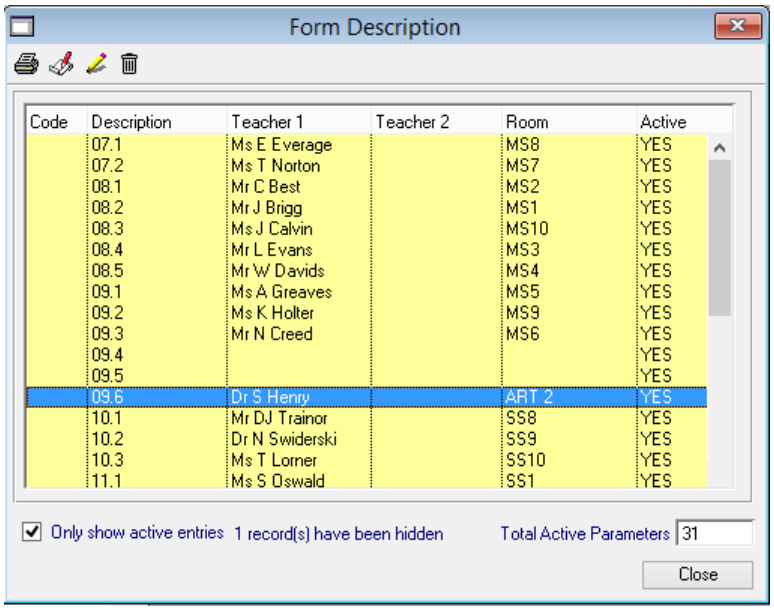
Step 21: Deactivate Form Rooms

Form Rooms which will no longer be used in 2020 can be deactivated.

Note: A Form Room cannot be deleted if students have ever been assigned or attached to the room.

General > Parameters > Form Description

- Highlight the Form Room which will not be used in 2020



- Click
- Untick the Active box

- Click ***OK***

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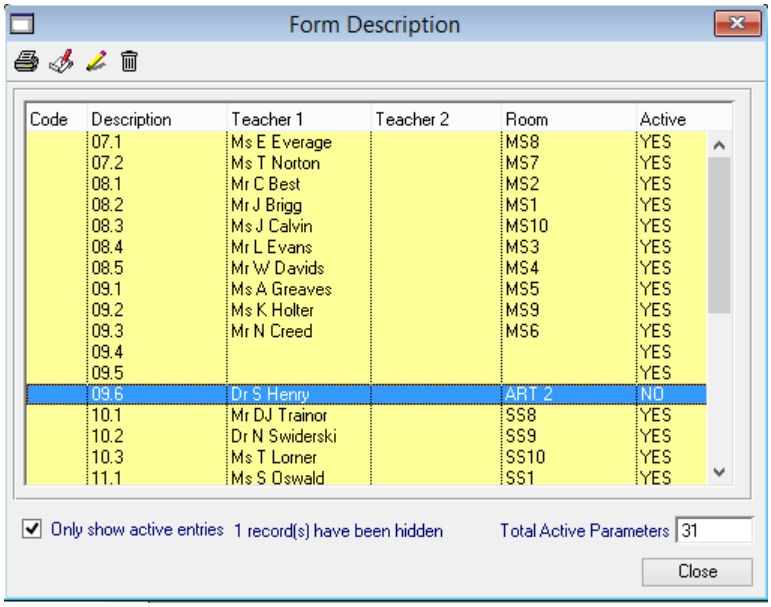
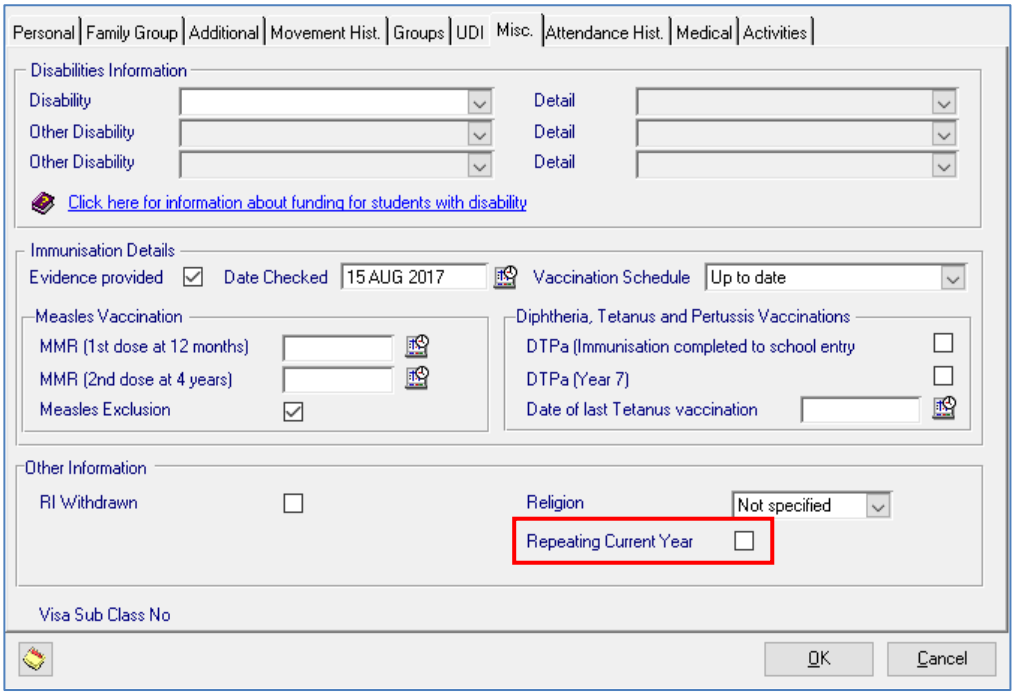


Step 22: Enter Repeating Students

General > Student Details

- Locate the record of the repeating student(s)
- Click Edit
- Select the ***Miscellaneous*** tab



- Check ***Repeating Current Year***
- Click ***OK***

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Step 23: Assign Family Representatives

The Family Representative Field flags a student as being the one who, for example, is given newsletters on behalf of a family.

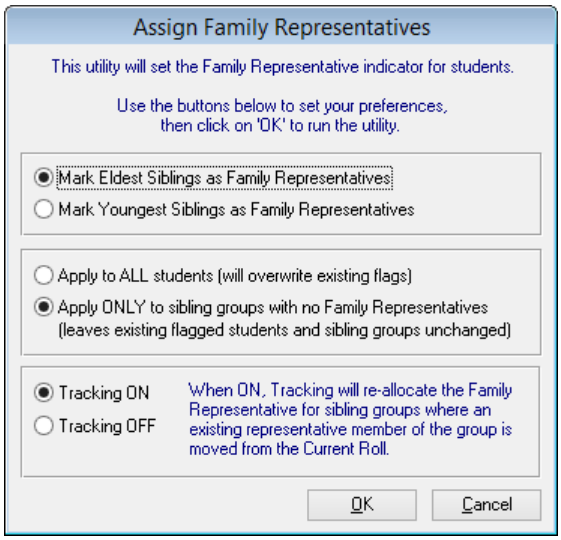
One or more members of a sibling group may be flagged as Family Representatives, although it is anticipated that the marker will usually be attached to the eldest or youngest sibling enrolled at the school.

The Family Representative Field is available in the address area of the Student Details. The field is also included in Student Find, Speed Edit and Ad-Hoc Reporting.

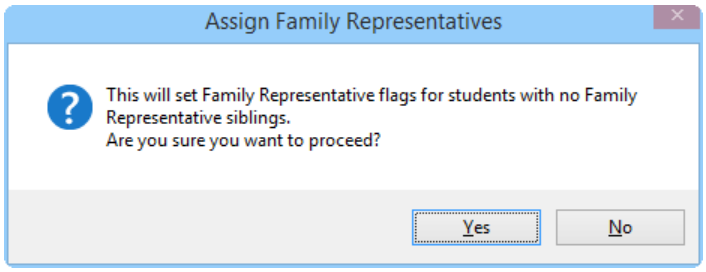
Users may wish to control the allocation of family representatives manually. However, to assist in the flagging of representatives a utility is provided.

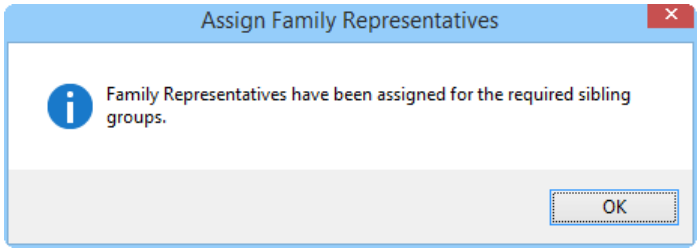
Admin > Utilities > Assign Family Representative

- Enter the desired settings



- Click ***OK*** and ***Yes***





- Click ***OK*** to finish

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Step 24: Print State Archives Report

As part of the 2019 End of Year Process, schools are required to produce the State Archives Report, which will ensure schools comply with the State Records Act 2000. As SIS is not a Records Management compliant system, and in the absence of an electronic records and document management system for schools, enrolment records for students who have left the school, held within SIS, are required to be produced in a hardcopy format.

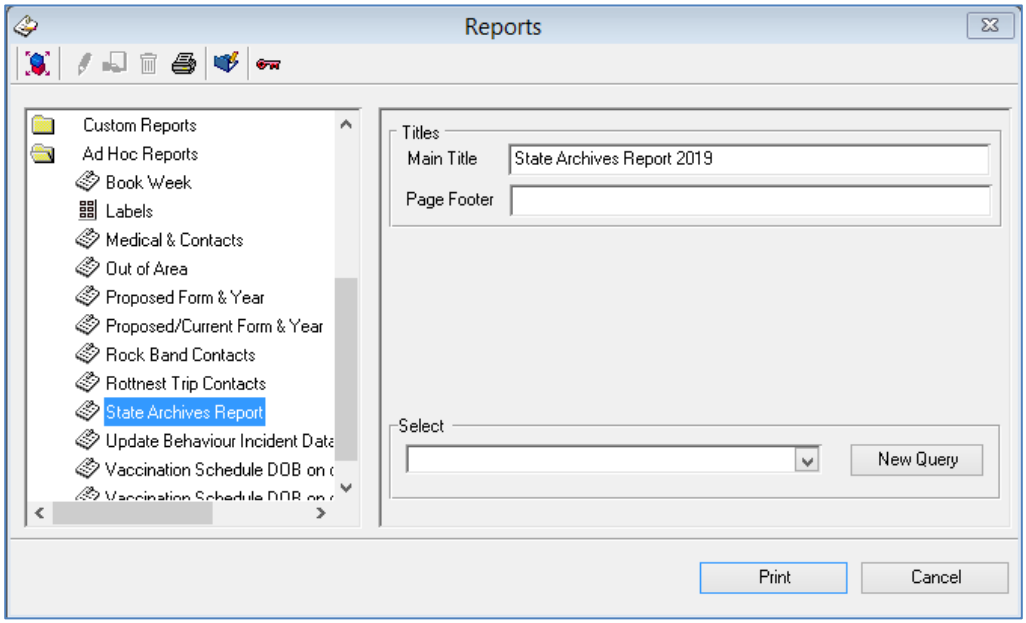
The process will include:

- Producing the relevant printout. This will list the various student enrolment details for left students only.
- Printing the hardcopy report and filing it in the 859 category of the School Filing System, for example 859/nn - STUDENT MANAGEMENT – ENROLMENTS – Enrolment details of students who left [name of school] in 2019.
- Retaining the file as an archival record

At the end of a year, close the file and process it in accordance with the procedures in the Records Management Manual for School, College and Campus Records relating to the transfer of archival records to the State Records Office of Western Australia.

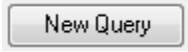
Admin > Reports > Ad Hoc Reports

- Open the ***Ad Hoc Reports*** folder



- Highlight ***State Archives Report***
- *Add **2019** to the Main Title, as shown above*

Note: The report will only need to show students who have left school in the current calendar year.

- Click ***New Query*** 

- ***Find*** the students with the Roll Status: ***--n/s--***

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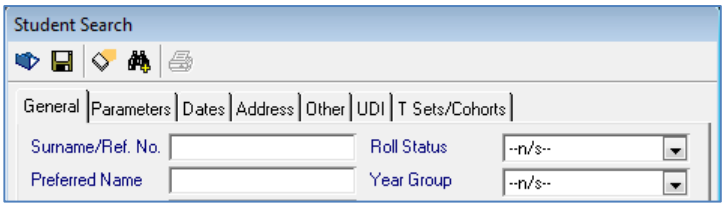
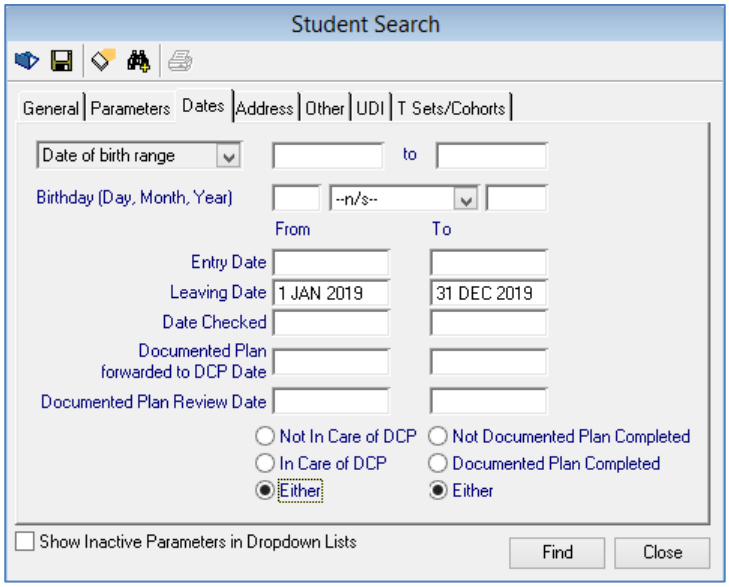


- Click on the ***Date*** tab
- Enter ***Leaving Dates*** for ***2019***



- ***Find***, ***Select*** and ***Yes***
- Click ***Print***

Note: A copy of this report must be printed and filed under School File Plan 859 – Student Management – Enrolments. The hardcopy file must be clearly labelled as 'State Archives Never to be destroyed'.

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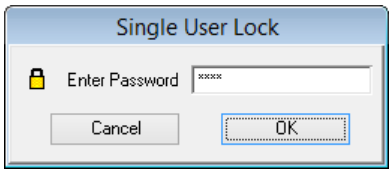
Step 25: Set up New Attendance Year (if the Lesson Attendance module is loaded)

This step applies to schools using the Lesson Attendance module. Please refer to the Lesson Attendance Manual if the module is not loaded. This Process should be done in Single User Lock.

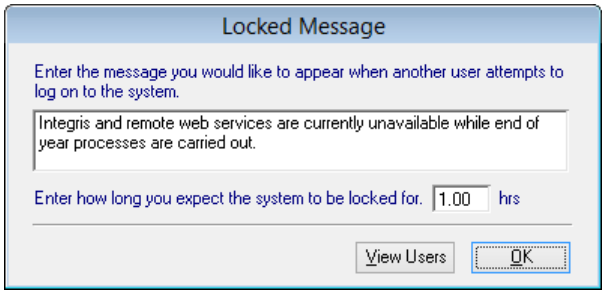
Before setting up your new attendance year, ensure that:

- Your data file has been backed up
- If you are using timetabling, the school's timetable specifies which periods are AM and which are PM in ***Timetabling > Timetable Setup > Timetable Cycles > Master Period Structure***
- Ensure all other users are logged out of Integris

File > Single User Lock



- Type your password and click ***OK***

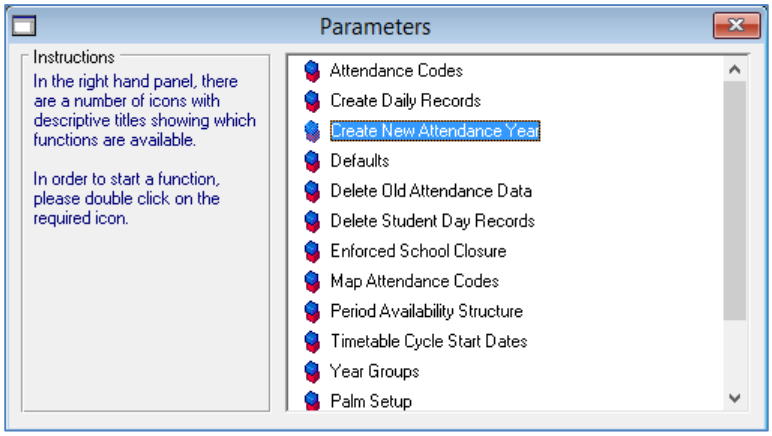


- Click ***OK***

Single User lock is now activated and the icon appears in the top tool bar

Lesson Attendance > Parameters > Create New Attendance Year

- Double click on Create New Attendance Year



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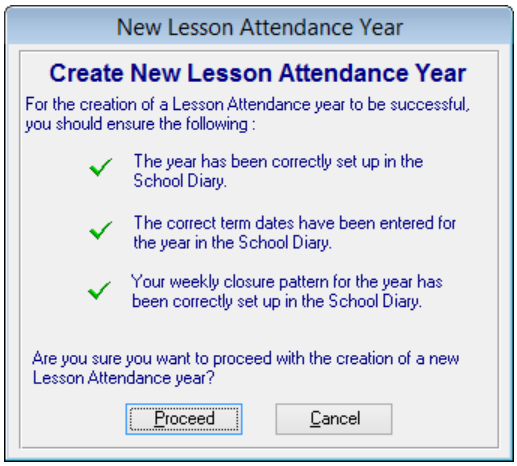
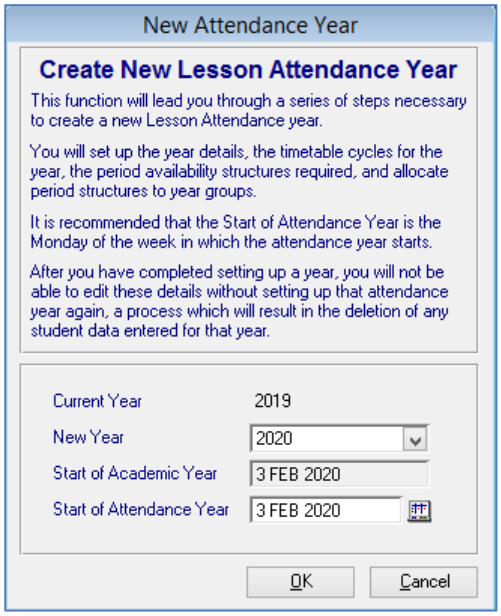
- View prerequisites to setting up the new Attendance Year in the New Lesson Attendance Year window



- Click ***Proceed***
- Enter the following dates and click ***OK***



IMPORTANT: The Attendance Year always commences on a Monday.

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The FTE warning check runs if either:

1. K students (and not P) are included in the current LA structure
2. P students (and not K) are included in the current LA structure
3. Both K and P students are included

The FTE for all students on the Current Roll is checked against the expected value for their year group.

The expected FTE for a student in each year is as follows:

Lesson Year Group	Expected FTE
Year group K	FTE < 1.0
All other Year Groups	FTE = 1.0

If all students on the Current Roll have the expected FTE value based on their Year Group then the Create New Year process will proceed as per the current process.

Where neither Year Group K or P are defined as Year Groups using Lesson Attendance then the check on Student FTE will not be run and the Create New Year process will proceed as per the current process. This includes Secondary Schools.

If at least one student is found on the Current Roll whose FTE value does not match the expected value in the table above, then a warning report is generated. See the example on the next page.

The warning report orders students by surname and displays the following:

- Student Name
- Year Group
- Form
- FTE
- Expected FTE

The report will appear as a screen report, without the user being presented with the Report Destination window. The user can print the report to printer via the printer icon at the top left of the screen report if required.

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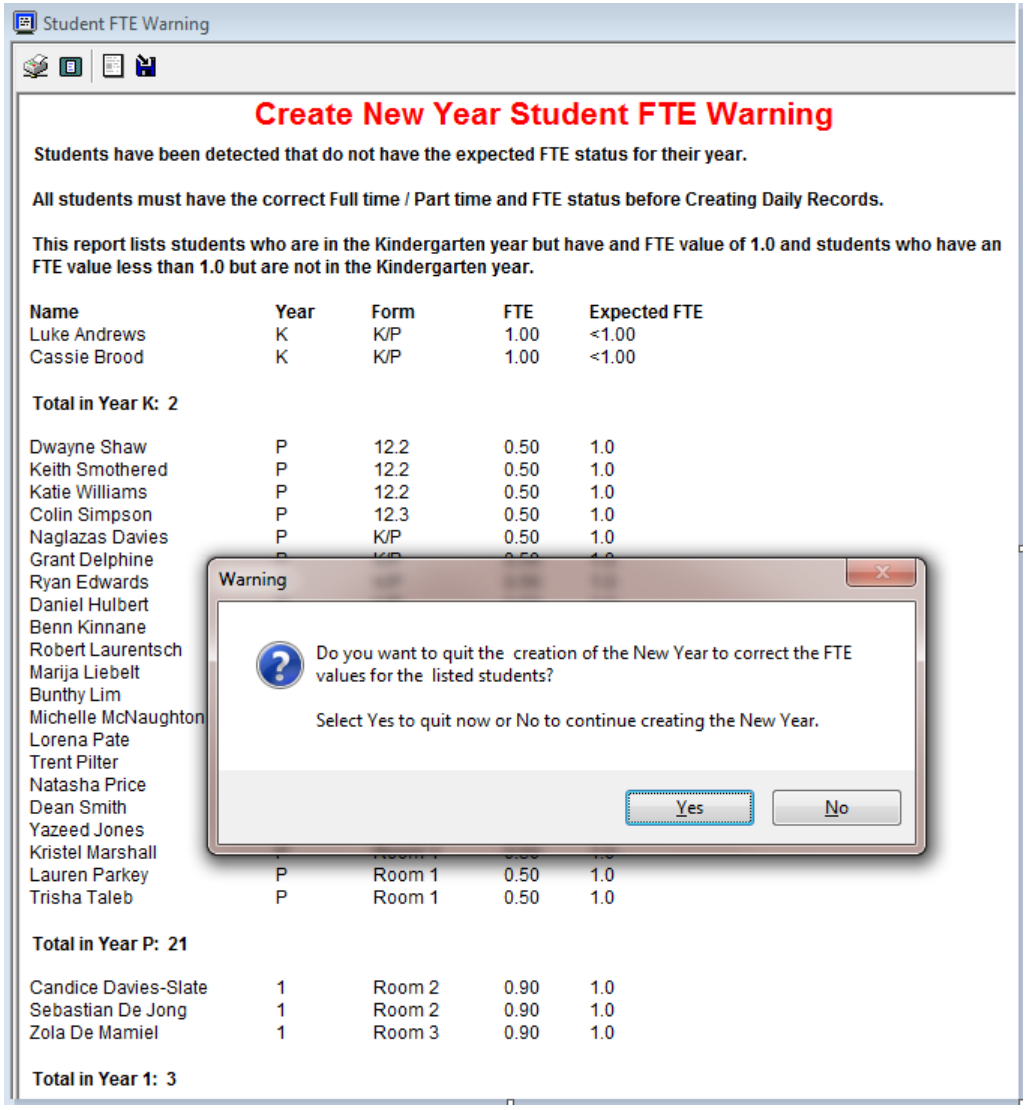

Where this report is generated, it will appear before the Period Availability Structures message.

Selecting **Yes** to the message shown above will stop the creation of the New Year.

Selecting **No** to the message shown above and closing the FTE Warning Report, will continue the New Year creation, showing the Period Availability message on the next page.

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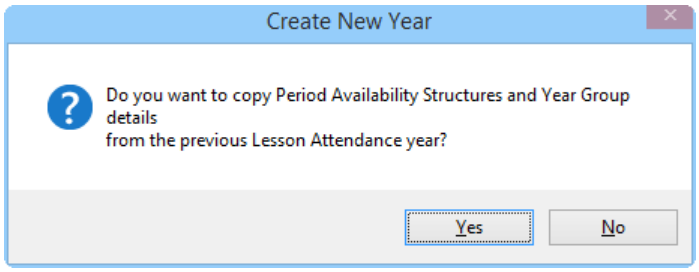


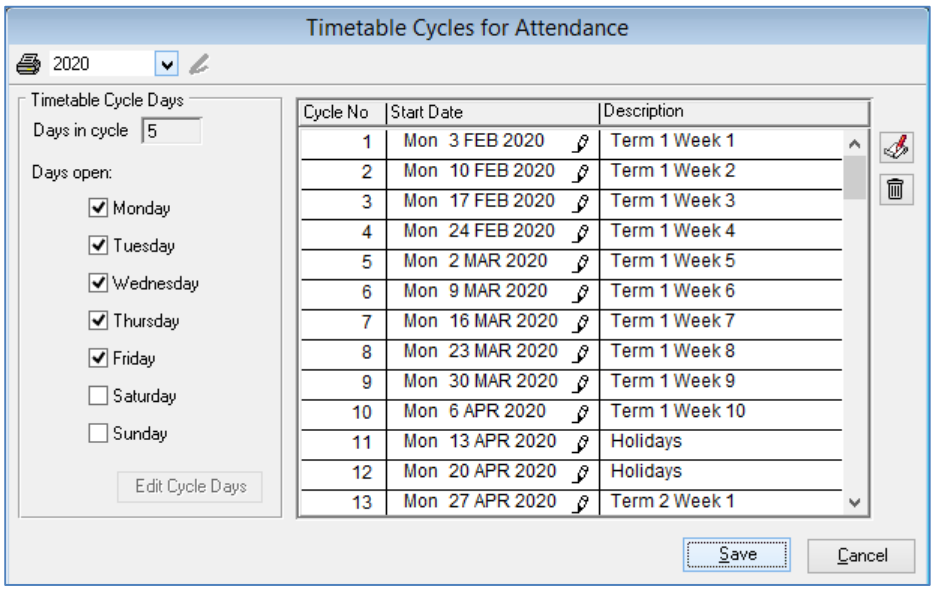
- Click Yes

Note: Schools would normally copy the previous year's set-up if the Period Availability Structures and Year Groups remain the same from one year to the next.

- View ***Cycle Start Dates*** and ***Descriptions***

Cycle descriptions can be edited to display in Day View the terminology used in your school.

- Place your cursor immediately before ***Week 1***
- Type ***Term 1*** and a space
- Highlight ***Term 1*** and a space - ***<Ctrl> +C*** to copy
- Place your cursor immediately before ***Week 2***
- ***<Ctrl> + V*** to paste
- Continue for all remaining weeks in Term 1
- Overtype ***Week 11 and 12*** with ***Holidays***
- Overtype ***Week 13*** with ***Term 2 Week 1***



- Continue to edit the descriptions for the entire year
- Click ***Save*** and ***Yes***
- Click ***Next*** and ***Yes***

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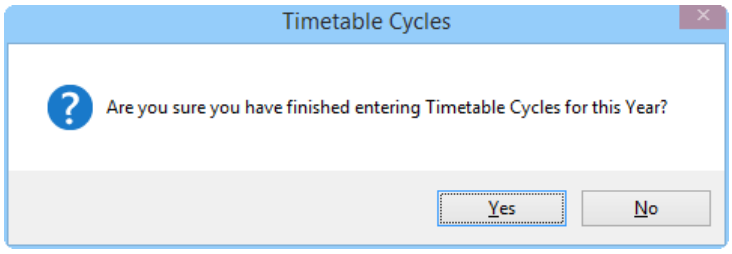
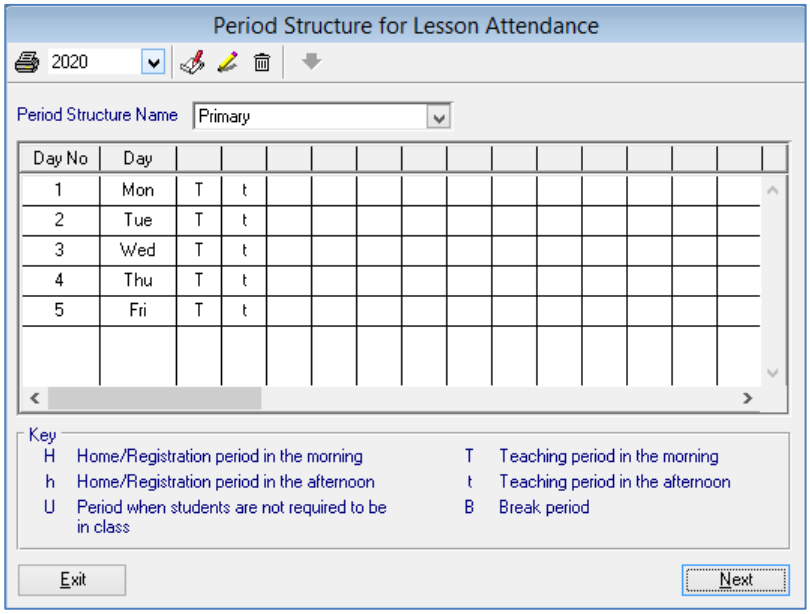


25.1 View the Available Period Structures

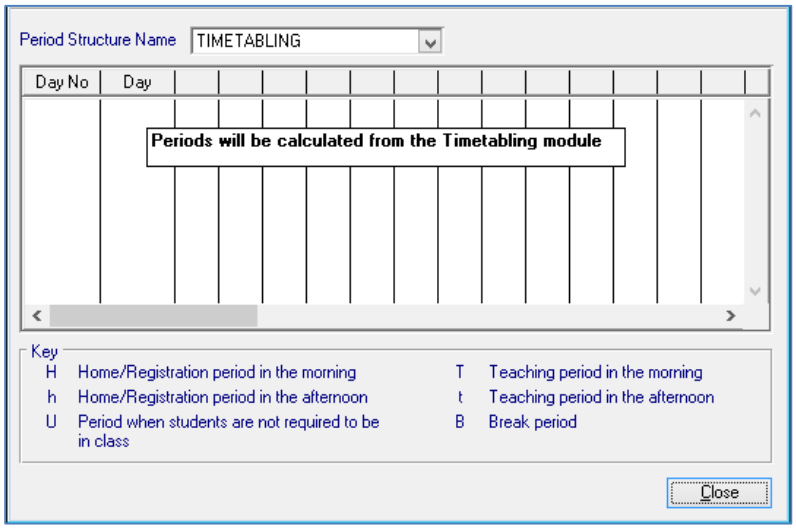
25.1.1 Primary Period Structure

The ***Primary*** structure displays as two attendance sessions: one for ***am*** (indicated by ***T***) and one for ***pm*** (indicated by ***t***).



25.1.2.Timetabling Period Structure

Timetabling links lesson attendance data directly to the timetable.



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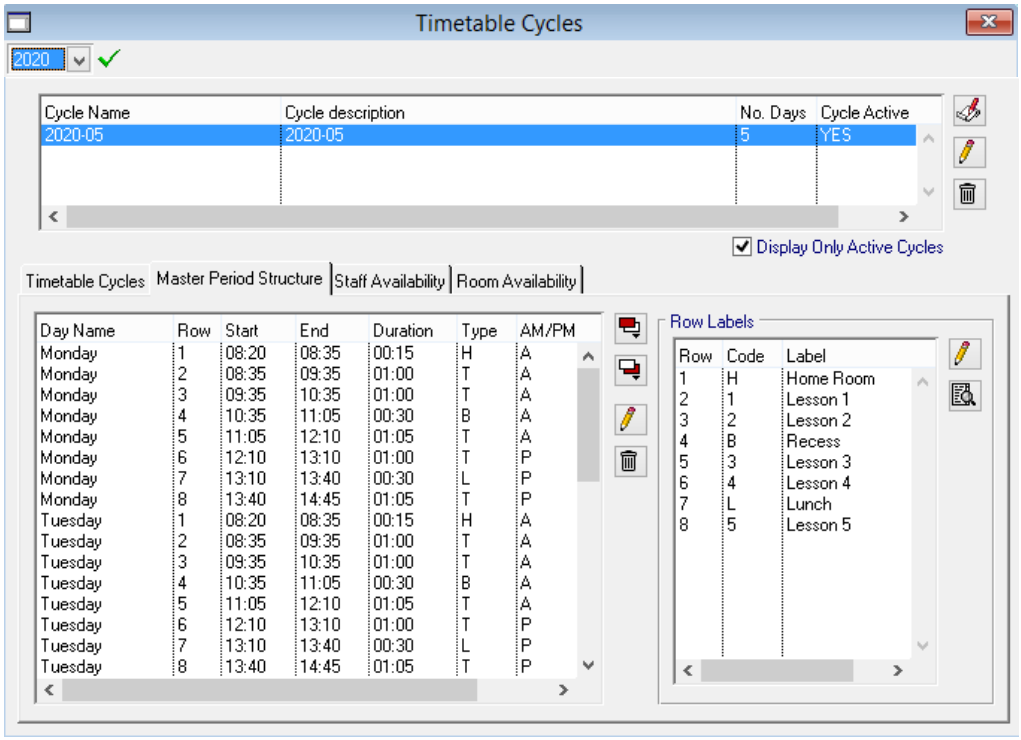
The period structure in this instance is defined in ***Timetabling > Timetable Setup > Timetable Cycles > Master Period Structure***.



Every student must have a timetable for their Lesson Attendance data to be recorded.

25.1.3 Secondary Period Structure

A ***Secondary*** Period Structure could be used by a Secondary School that does not use Timetabling. This allows student attendance to still be recorded for each period.

Note: There is no direct link to timetabling from a Secondary Period Structure

If adding a new Secondary structure:

- Click Add

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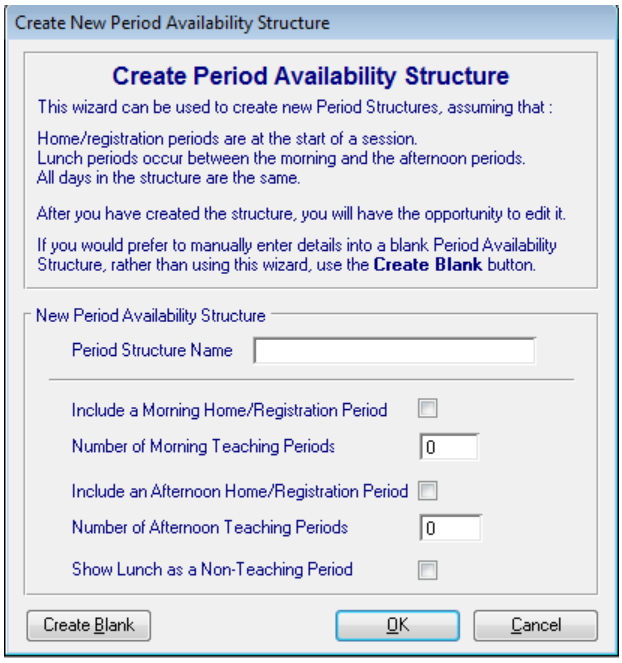
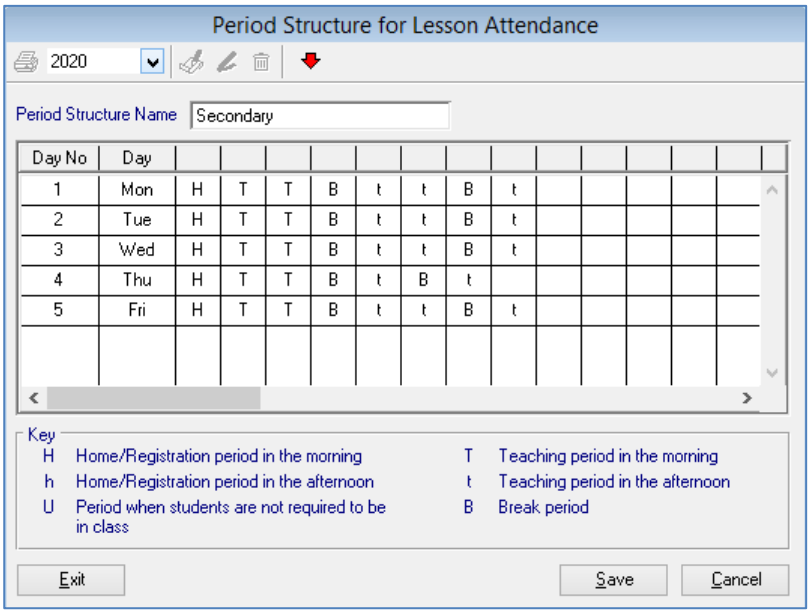


- Click ***Create Blank***
- Enter the period structure for your school and ***Save***



Period type codes are used to define teaching and non-teaching periods. These are:

T – Teaching Period (AM Period)
t – Teaching Period (PM Period)
H – Home
B – Break

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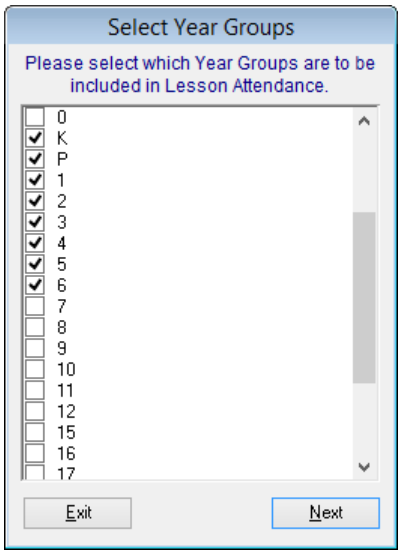
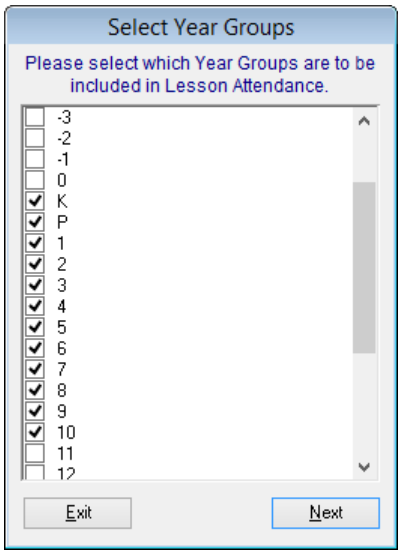
Note: If you require a Secondary or another alternative period structure and it does not appear in the period structure drop down menu, contact the Customer Service Centre on 9264 5555 (metro) or 1800 012 828 (regional) or Customer.Service.Centre@education.wa.edu.au

- Click ***Save***, ***Next*** and ***Yes***
- Select the relevant Year Groups to be included in Lesson Attendance for your school

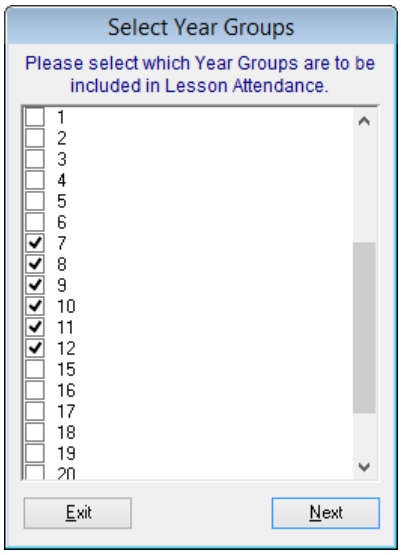
Primary School K-6



District High School K-10

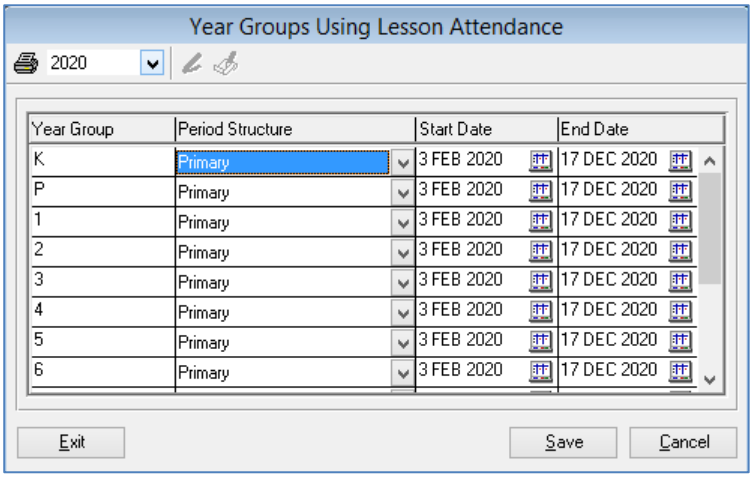


Secondary High School 7-12



- Click ***Next***
- Select the appropriate Period Structure for each year group

Primary School (K-6)



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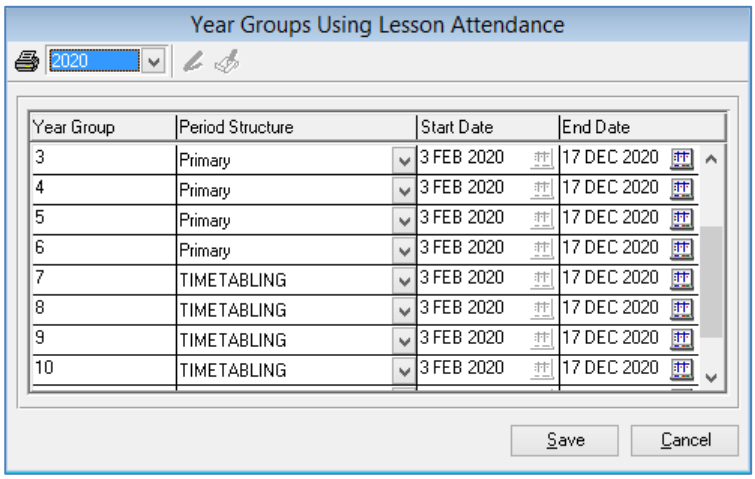
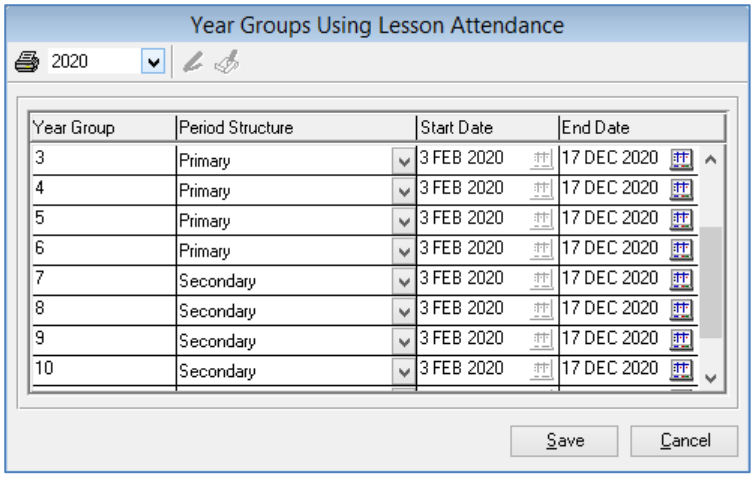
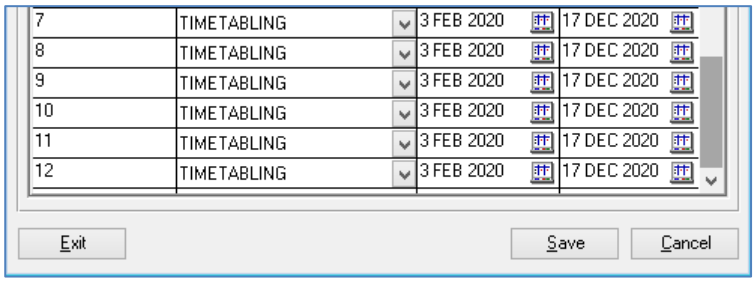
District High School (K-10)



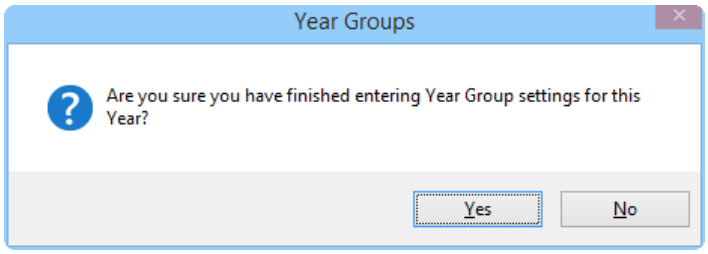
OR



Secondary High School (7-12)



- Click ***Save***
- Click ***Finish*** and ***Yes***



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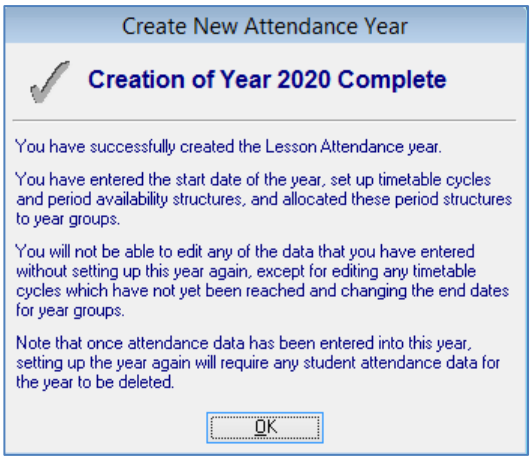
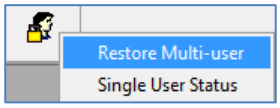


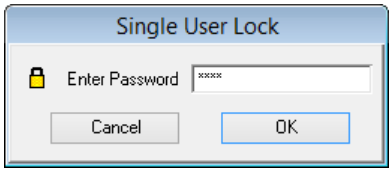
- Click ***OK***

Restore Multi-User when you have finished setting up the Lesson Attendance Year.

- Click on the Single User Lock Icon
- Select Restore Multi-user



- Type your password and click OK



Note: For any variation to the last day of attendance for students, please contact the policy area.

Note: Attendance Records must be created daily so that absences can be entered into SIS. It is recommended that this is done before classes commence each school day or late each afternoon for the following day. This task will generally only take a few seconds. Refer to the Fact Sheet Creating Daily Records for further information.

Refer to SIS Classic Lesson Attendance for further information

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Step 26: Notification of Transfer

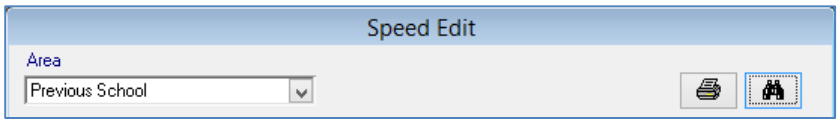
Schools are reminded that they must provide written or electronic notification of the date an enrolment commences, to the school where the new student was previously enrolled. This includes notification to Primary Schools when students are enrolling in Secondary Schools for the first time.

Note: These notes assume that this process is being undertaken at the commencement of the 2020 School Year. If the report is being generated for a different period, modify the dates accordingly.

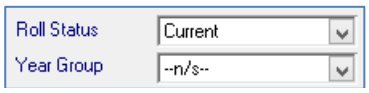
Confirming Enrolment to the Previous School

Admin > Speed Edit

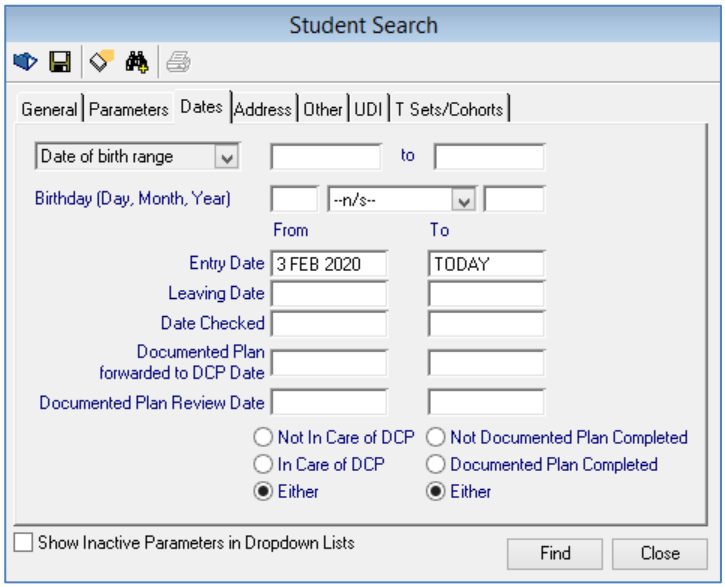
- Select ***Previous School*** from the ***Area*** drop down list



- Open the ***Student Search*** window and ensure the ***Current Roll*** is selected



- In the ***Dates*** tab, enter an ***Entry Date*** range of ***03 FEB 2020*** to ***Current Date***



- Click on ***Find***, ***Select*** and ***Yes***

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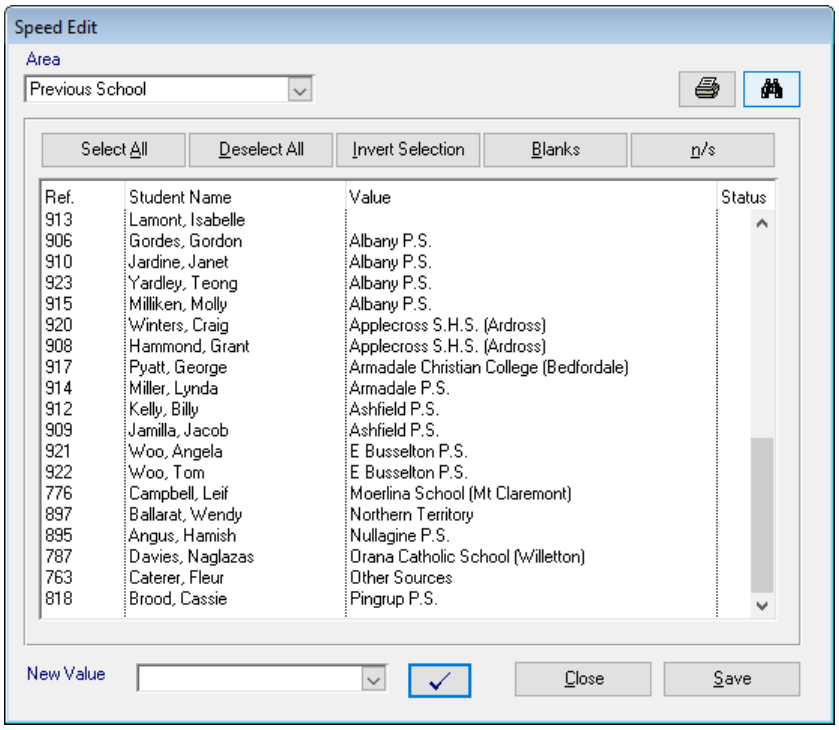
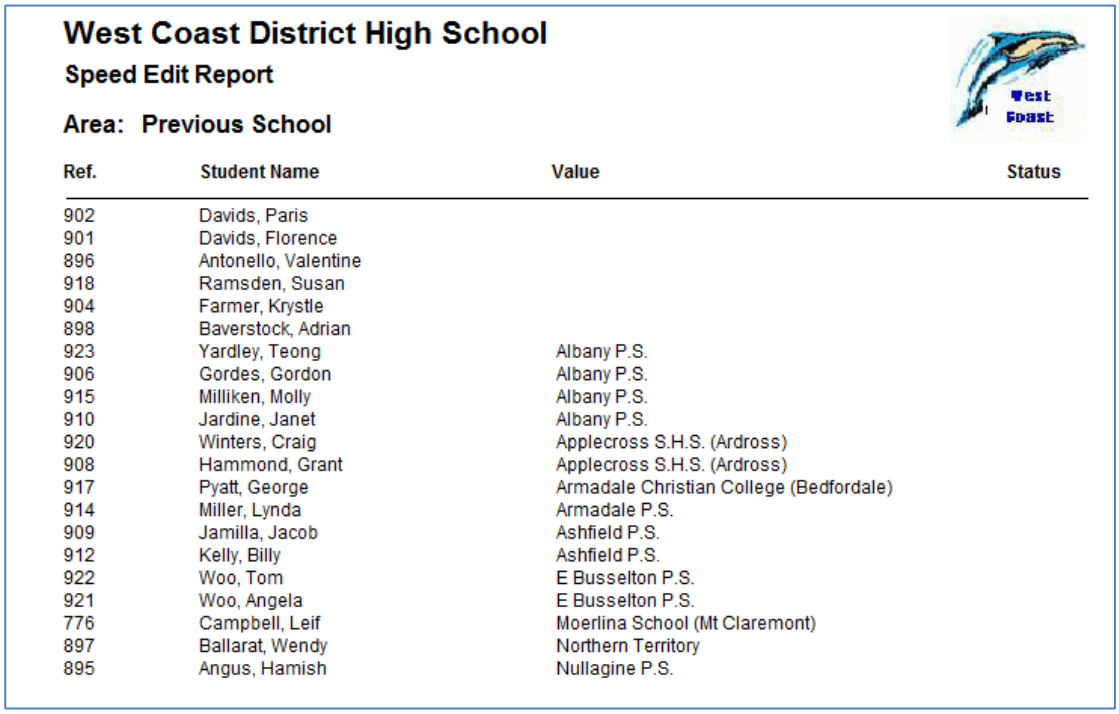
A list of students and their previous school will be displayed.

- Click on the ***Value*** heading to sort the list by school



- To print the list, select the printer icon



West Coast District High School

Speed Edit Report

Area: Previous School

Ref.	Student Name	Value	Status
902	Davids, Paris		
901	Davids, Florence		
896	Antonello, Valentine		
918	Ramsden, Susan		
904	Farmer, Krystle		
898	Baverstock, Adrian		
923	Yardley, Teong	Albany P.S.	
906	Gordes, Gordon	Albany P.S.	
915	Milliken, Molly	Albany P.S.	
910	Jardine, Janet	Albany P.S.	
920	Winters, Craig	Applecross S.H.S. (Ardross)	
908	Hammond, Grant	Applecross S.H.S. (Ardross)	
917	Pyatt, George	Armadale Christian College (Bedfordale)	
914	Miller, Lynda	Armadale P.S.	
909	Jamilla, Jacob	Ashfield P.S.	
912	Kelly, Billy	Ashfield P.S.	
922	Woo, Tom	E Busselton P.S.	
921	Woo, Angela	E Busselton P.S.	
776	Campbell, Leif	Moerlina School (Mt Claremont)	
897	Ballarat, Wendy	Northern Territory	
895	Angus, Hamish	Nullagine P.S.	

A Transfer Note or list of students must be sent to each school identified in the previous school list, advising that the student is now enrolled at your school.

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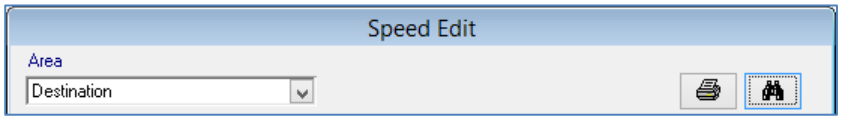
Step 27: Checking the Destination of Former Students

Schools must determine the destination of each leaving student. 'Not specified' should only be used for Year 12 Leavers. Those students making the transition from Primary to Secondary School, Middle School to Senior Campus and District High School to Senior Campus must have a destination school entered.

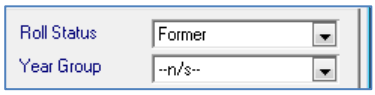
Schools should check the Transfer Note details to ensure the correct destination school has been entered against the student's record. To assist in this process, schools can print a list of all students on the Former Roll displaying their destination school.

Admin > Speed Edit

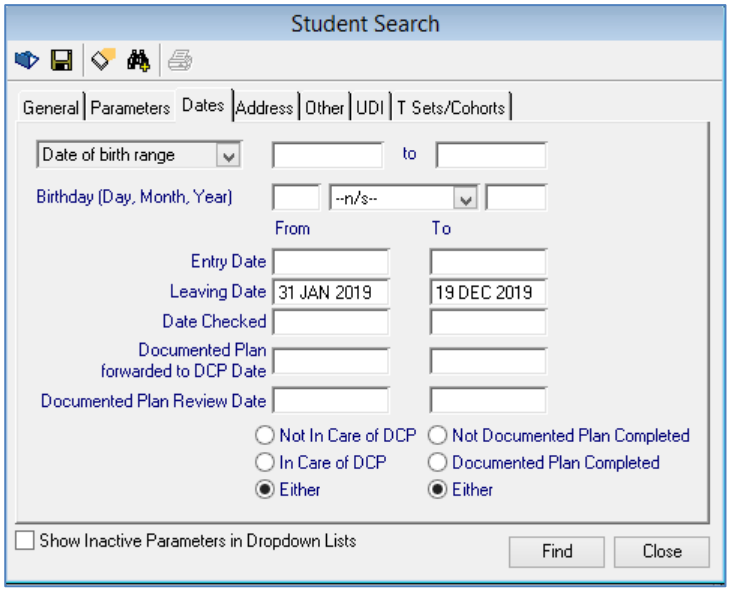
- Select ***Destination*** from the ***Area*** drop down list



- Open the ***Student Search*** window and select the ***Former Roll***



- In the ***Dates*** tab, enter a ***Leaving Date*** range of ***31 Jan 2019*** to ***19 DEC 2019***



- Click on ***Find***, ***Select*** and ***Yes***

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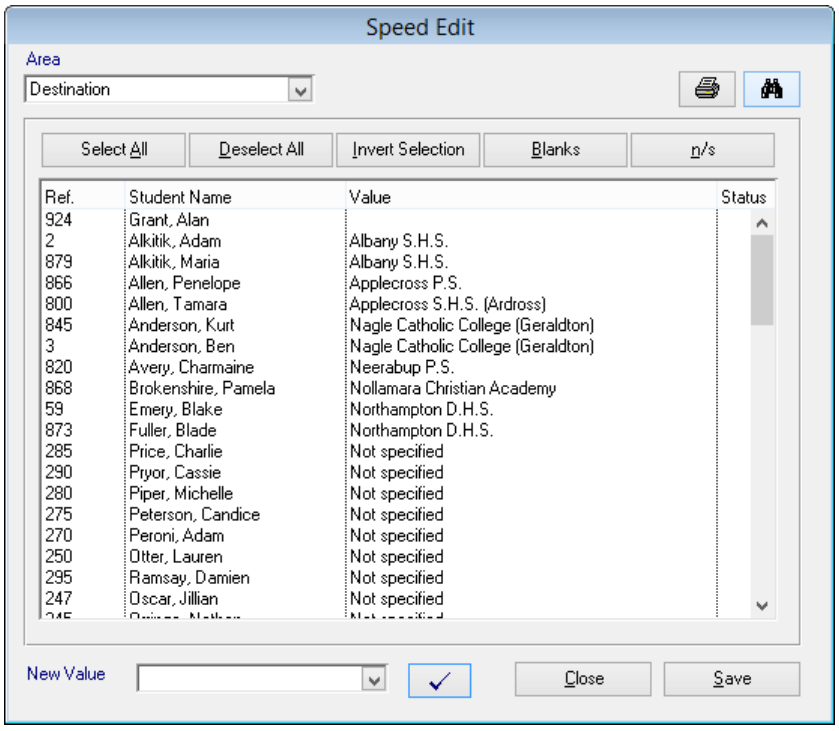
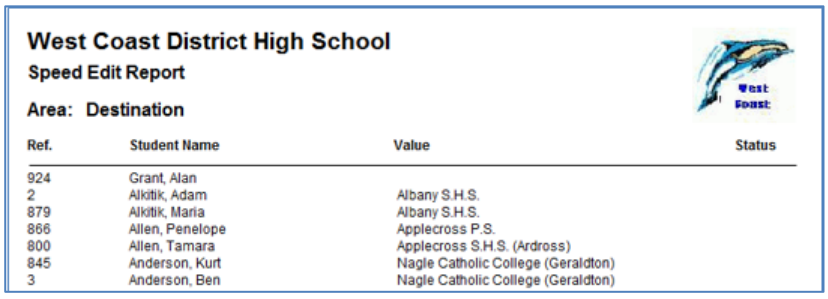
A list of students and their destination school will be displayed.



- To print the list, select the printer icon



West Coast District High School

Speed Edit Report

Area: Destination

Ref.	Student Name	Value	Status
924	Grant, Alan		
2	Alkitik, Adam	Albany S.H.S.	
879	Alkitik, Maria	Albany S.H.S.	
866	Allen, Penelope	Applecross P.S.	
800	Allen, Tamara	Applecross S.H.S. (Ardross)	
845	Anderson, Kurt	Nagle Catholic College (Geraldton)	
3	Anderson, Ben	Nagle Catholic College (Geraldton)	

Notes: It is the school's responsibility to follow up transfer notes. Where an advice of transfer has not been received for a particular student, the school should follow up with the parent to determine the destination and confirm the enrolment with the new school. Where schools are unable to verify student destination following investigation, the student may be considered 'whereabouts unknown' and should be referred to the Student Tracking Coordinator through the Education Regional Office.

Note: Further information outlining this process can be found at: http://det.wa.edu.au/studentsupport/behaviourandwellbeing/detcms/navigation/student-attendance/

If a student returns after being moved to the former roll in the year end process, contact the Customer Service Centre on 9264 5555 (metro), 1800 012 828 (regional) or Customer.Service.Centre@education.wa.edu.au

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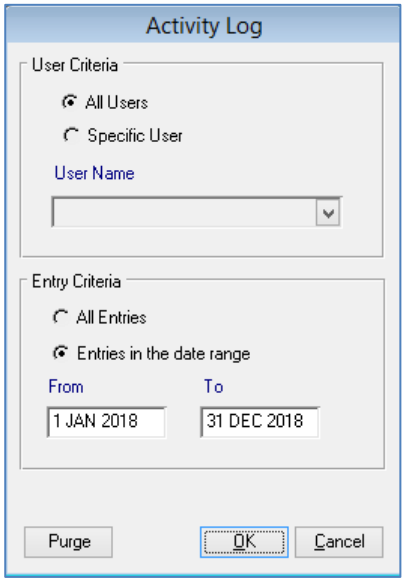
Step 28: Purge the Audit Trail

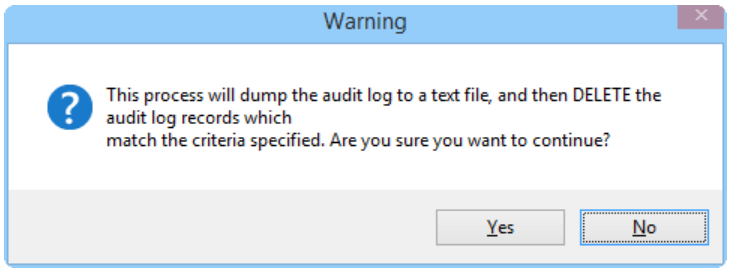
General > Control > Audit

- Select ***All Users*** and ***Entries in the date range.***
- Enter the date range for the calendar year e.g. ***1 JAN 2018*** to ***31 DEC 2018***

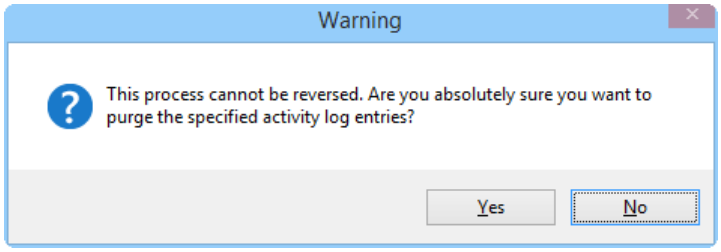
Note: Audit entries for 2019 will be purged at the end of 2020



- Click ***Purge***



- Click ***Yes***



- Click ***Yes***
- Save to ***K:\Keys\Integris\Outbox*** with the file name: ***2018 Audit Log***

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Contact the Customer Service Centre on 9264 5555 (metro), 1800 012 828 (regional) or Customer.Service.Centre@education.wa.edu.au if you have any queries regarding the Year End process.

Step 29: Support

Should you require support please contact the **Customer Service Centre (CSC)** at the Department of Education.

Contact details below:

29.1 Phone (CSC)

Metro: 9264 5555
Country: 1800 012 828

Please be prepared to supply your *ID number*, *contact details* and a *brief description* of the problem.

29.2 Email (CSC)

customer.service.centre@education.wa.edu.au

Please include your *ID number*, *contact details* and a *brief description* of the problem.

Step 30: Online Manuals and Training Notes

30.1 Civica Education

Online manuals and training notes are available to download in PDF format from the Civica Education website.

http://www.civicaeducation.com.au/

Select: ***Integris Support,***
Log in to ***Western Australian SIS Schools***
Username: ***school***
Password: ***help***

30.2 STIMS Project

The Department's Student Information Management Project (STIMS) website has numerous factsheets and support documents for all SIS Administration modules.

The Department's Ikon website has numerous factsheets and support documents for all SIS Classic Administration modules. Simply search for the area of interest using the search function. Manuals can be accessed from the help menu within Integris.

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