

# CIVICA

Transforming the way you work



## Integris Classic

2019 Admin EOY Fact Sheet

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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](mailto:Customer.Service.Centre@education.wa.edu.au)***

## 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.	<b>Back up the Data File</b>	
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.**

### **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.

## 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

The screenshot shows the 'Reports' window with the 'Standard Student Check List' report selected in the left-hand tree. The main area displays the 'Layout' tab, which includes a preview of the report header and footer, and a 'Title' field containing 'Proposed Year/Form'. The 'Options' section on the right has radio buttons for 'Small Font Report' (selected), 'Large Font Report', 'Preferred Name' (selected), and 'Legal Name'. At the bottom are 'Print' and 'Cancel' buttons.

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

The screenshot shows the 'Sort' tab in the Reports window. It displays a table with columns for 'Surname', 'First Name', 'Sex', 'DOB', and 'House'. The 'Form' and 'Year' options are selected in the 'Sort Field' column. The 'Total' and 'Page' checkboxes are also checked.

	Sort Field	Total	Page
1	Form	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Year	<input type="checkbox"/>	<input type="checkbox"/>

- Click **Select** tab and choose **Form** option
- Click  **Select All** to highlight all forms

The screenshot shows the 'Select' tab in the Reports window. It displays a list of options for 'Year Group' and 'Form'. The 'Form' option is selected. The 'Select All' button is visible at the bottom right.

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

Reports

Standard Student List  
**Standard Student Check List**  
 House/Faction List  
 House/Faction Check List  
 House/Faction Summary Report  
 House/Faction Listing  
 Birthday Report  
 Student Update Form  
 Immunisation Report  
 Students with the same address  
 Students for a Parent/Guardian  
 Family Representative List  
 Student Profile  
 Student Health Care Summary  
 Students with a Documented PL  
 Family Mail Marker List

Layout | Sort | Select | Includes

☐ Selection Criteria  
☐ Student Ref Number  
☒ Form Teacher(s)  
**Order**  
 2 ☒ Student Year Group  
 1 ☒ Student Form  
☐ Teacher Name(s)  
☐ Student Sex  
☐ Student House  
☐ Student DOB  
☐ Family Rep Flag  
☐ Student Number

Column Label	Width
<input checked="" type="checkbox"/> 2020 Form	3.000
<input checked="" type="checkbox"/> 2020 Year	3.000
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Available Space (in Cm) remaining: 13.994

Print Cancel

- 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.

Save as a Custom Report

- Enter a name for the custom report

Report Title

Please enter a title for the report

Proposed Year and Form

Cancel OK

- Click **OK**

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

### 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.

School Details

School Name: West Coast District High District/School: 123 / 4567  
Principal: Mr Carl Best District Code: 4098  
Address: 1120 Hay Road  
State: PERTH Western Australia  
Postcode: 6005  
Country: Australia  
Telephone 1: 9412 3456  
Telephone 2: 9423 6897  
Fax: 9423 6980  
E-Mail: wcoastdhs@ozemail.com.au  
Internet:  
Exam Centre Number:  
District Name: West Coast  
Intake Gender: Mixed  
School Type: District High School  
School Control: DoE  
Curriculum Group: Not specified  
Intake Year: K  
Leavers Year: 6  
Max Intake: 0  
Number on Roll: 525  
Kindergarten: ☒  
Default FTE: 1.00

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

### School Details in Edit Mode

School Details

Main Details | Additional Sites | Directory | Activity | UDI

School Name: West Coast District High District/School: 123 / 4567  
Principal: Mr Carl Best District Code: 4098  
School Address: 1120 Hay Road  
Town/Sub: PERTH  
State: Western Australia  
Postcode: 6005  
Country: Australia  
Telephone 1: 9412 3456  
Telephone 2: 9423 6897  
Fax: 9423 6980  
E-Mail: wcoastdhs@ozemail.com.au  
Internet Address:  
Exam Centre Number:  
District Name: West Coast  
Intake Gender: Mixed  
School Type: District High School  
School Control: DoE  
Curriculum Group: Not specified  
Intake Year: K  
Leavers Year: 6  
Max Intake: 0  
Kindergarten: ☒  
Default FTE: 1.00

## Step 4: Back up the Data File

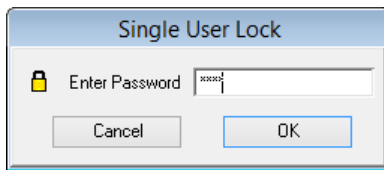
It is necessary to make a copy of the data file as it stands *before* you set up a new academic year, in case you inadvertently delete the current year's data. This involves making a copy of the current year's data file and storing it in a folder where it is accessible if needed.

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

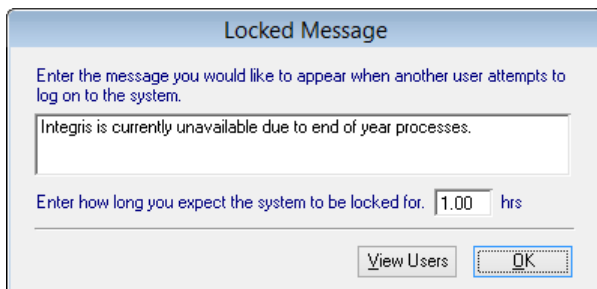
Ensure all users are logged out of Integris and the datafile is in **Single User Lock** prior to using the New Safe Backup.

To go into Single User Lock:

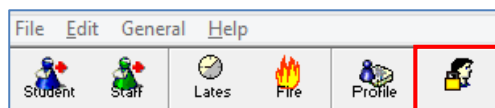
- Click on the File Menu and select Single User Lock
- Enter your password and click OK



- 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

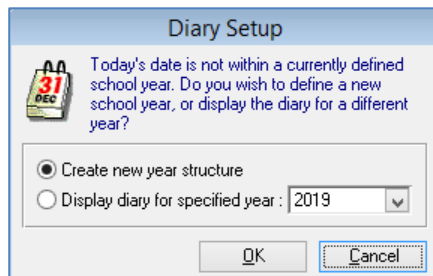
***You will be asked to repeat this backup prior to processing Year End (Step 12) because of any changes you have made to the datafile between now and then.***




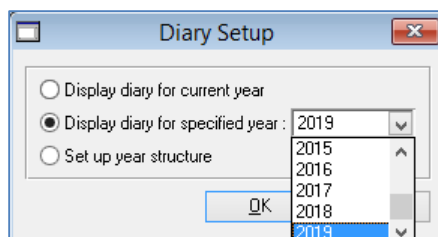
## Step 5: Set up the School Calendar for the New Year

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

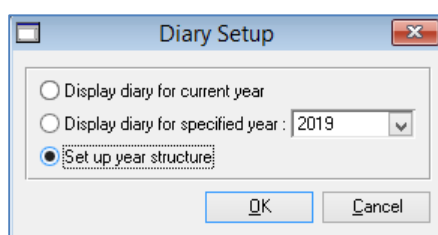
**Note:** If the diary is opened outside of the school year, the following window opens and users will need to select the option they require.



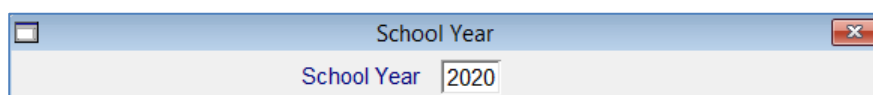
- Click on Setup School Year 
- Place the radio button in front of **Display diary for specified year** and, if possible, choose **2020** from the drop-down list



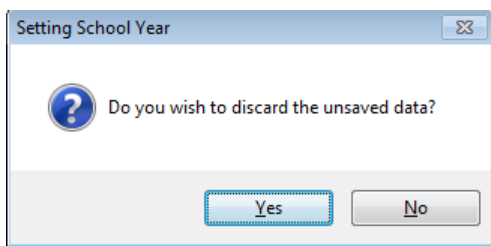
- If **2020** does not appear in the drop-down list, the calendar has not yet been set and will have to be set up
- Click on **Set up year structure** and 2019 will appear in School Year field



- 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**





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

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

Weekly Closure Pattern		Closure Codes	
	AM	PM	
Monday			
Tuesday			
Wednesday			
Thursday			
Friday			
Saturday	Closed	Closed	
Sunday	Closed	Closed	

Code	Description	Fill
Closure Code C	Closed	
Holiday Code H	Holiday	
Inset Code S	School Development	
Open Code		
School Event Colour		

- 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

School Term

Term Name: Term 1

Start Date:

End Date:

OK Cancel

- 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.

Warning

All terms must start on a Monday.

If the Monday is a Public Holiday or School Development Day it should be marked with the appropriate code after the School Year has been created.


Do you wish to continue?

Yes No

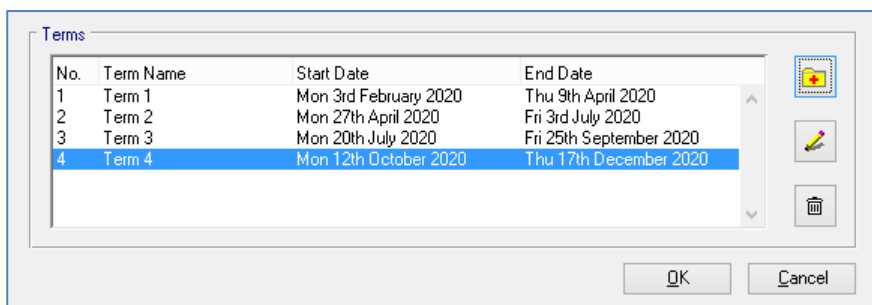
- If this message displays, click No and change the Start Date to a Monday

## 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.



No.	Term Name	Start Date	End Date
1	Term 1	Mon 3rd February 2020	Thu 9th April 2020
2	Term 2	Mon 27th April 2020	Fri 3rd July 2020
3	Term 3	Mon 20th July 2020	Fri 25th September 2020
4	Term 4	Mon 12th October 2020	Thu 17th December 2020


- 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.*

## 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.**

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

**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.**

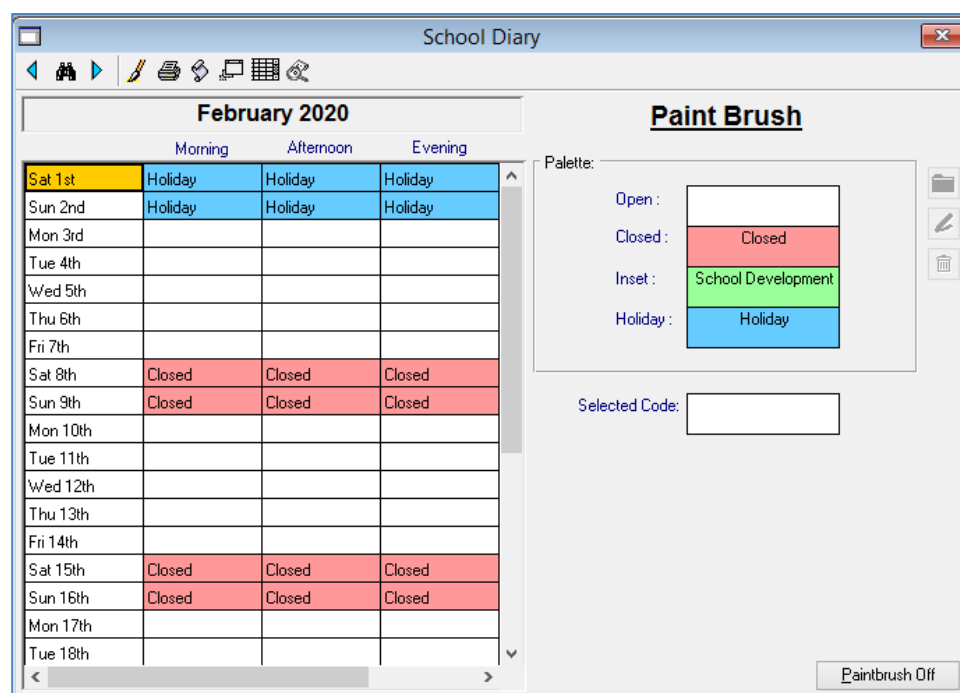
The Public Holidays for 2020 are:

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.



- 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

Timetabling Periods				
2020		T	S	
Code	Description	Start Date	End Date	Semester No.
2020	School Year - 2020	3 FEB 2020	17 DEC 2020	0
Semester 1	2020 Semester 1	3 FEB 2020	3 JUL 2020	1
Semester 2	2020 Semester 2	20 JUL 2020	17 DEC 2020	2

## 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](mailto:Customer.Service.Centre@education.wa.edu.au)***



## 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


Code	Description	Teacher 1	Teacher 2	Room	Active
07.1		Ms E Everage		MS8	YES
07.2		Ms T Norton		MS7	YES
08.1		Mr C Best		MS2	YES
08.2		Mr J Brigg		MS1	YES
08.3		Ms J Calvin		MS10	YES
08.4		Mr L Evans		MS3	YES
08.5		Mr W Davids		MS4	YES
09.1		Ms A Greaves		MS5	YES
09.2		Ms K Holter		MS9	YES
09.3		Mr N Creed		MS6	YES
09.4					YES
09.5					YES
10.1		Mr DJ Trainor		SS8	YES
10.2		Dr N Swiderski		SS9	YES
10.3		Ms T Lerner		SS10	YES
11.1		Ms S Oswald		SS1	YES
11.2		Ms S Corner		SS5	YES


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

Room 7				YES
Room 8				NO

- Click on the Edit Pencil 
- Check the Active box

- 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](mailto:Customer.Service.Centre@education.wa.edu.au) before proceeding.**

## 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.*

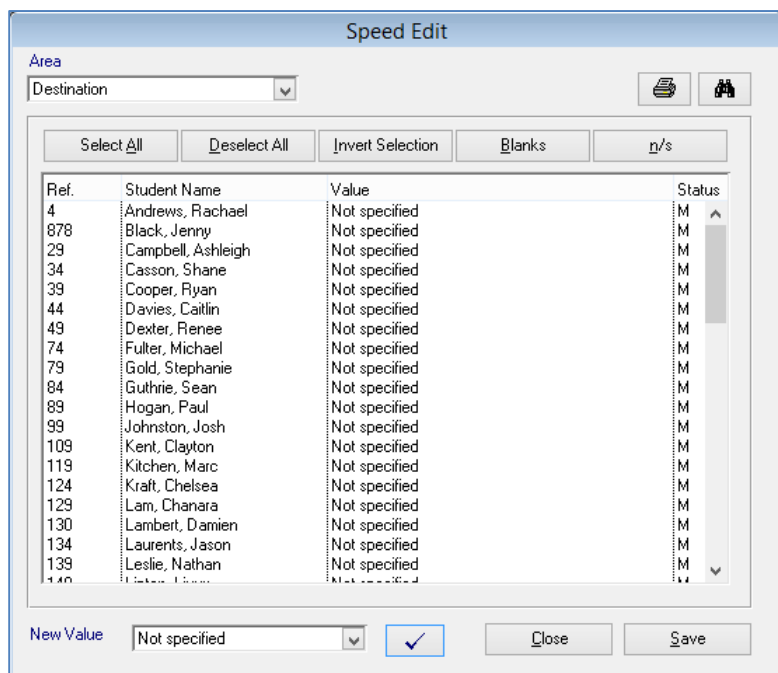
*This specifies where they are going (Destination) and the date they are leaving (Leave Date)*

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



Speed Edit


Area  
Destination

Select All Deselect All Invert Selection Blanks n/s

Ref.	Student Name	Value	Status
4	Andrews, Rachael	Not specified	M
878	Black, Jenny	Not specified	M
23	Campbell, Ashleigh	Not specified	M
34	Casson, Shane	Not specified	M
39	Cooper, Ryan	Not specified	M
44	Davies, Caitlin	Not specified	M
49	Dexter, Renee	Not specified	M
74	Fulter, Michael	Not specified	M
79	Gold, Stephanie	Not specified	M
84	Guthrie, Sean	Not specified	M
89	Hogan, Paul	Not specified	M
99	Johnston, Josh	Not specified	M
109	Kent, Clayton	Not specified	M
119	Kitchen, Marc	Not specified	M
124	Kraft, Chelsea	Not specified	M
129	Lam, Chanara	Not specified	M
130	Lambert, Damien	Not specified	M
134	Laurents, Jason	Not specified	M
139	Leslie, Nathan	Not specified	M
140	...	...	...


New Value Not specified


Close Save


- 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](mailto:Customer.Service.Centre@education.wa.edu.au)**

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


Area  
Leave Date 

- Select all of the students 
- Enter the leave date in the **New Value**


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


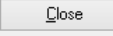
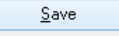
Speed Edit


Area  
Destination 

Select All Deselect All Invert Selection Blanks n/s


Ref.	Student Name	Value	Status
856	Allen, Penelope	Mount Lawley S.H.S.	M
856	Becker, Tareq	Perth Modern S.H.S. (Subiaco)	M
853	Brown, Steven	Mount Lawley S.H.S.	M
825	Content, Damien	Wesley College (South Perth)	M
828	Delamare, Graeme	Perth Modern S.H.S. (Subiaco)	M
830	Desilva, Haley	Perth College (Mount Lawley)	M
836	Edwardo, Jacob	Mount Lawley S.H.S.	M
835	Edwards, Justin	Wesley College (South Perth)	M
839	Elliott, Katherine	Perth College (Mount Lawley)	M
843	Farmer, Kristy	Mount Lawley S.H.S.	M
852	Farnton, Steven	All Saints' College (Bull Creek)	M
857	Gray, Tenille	Mount Lawley S.H.S.	M
863	Havlent, Tom	Perth Modern S.H.S. (Subiaco)	M
826	Hushler, Elizabeth	All Saints' College (Bull Creek)	M

New Value All Saints' College (Bull Creek)   

- 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**


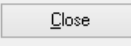
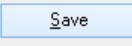
New Value  


Speed Edit

Area  
Leave Date

Select All Deselect All Invert Selection Blanks n/s

Ref.	Student Name	Value	Status
866	Allen, Penelope	19 DEC 2019	M
856	Becker, Tareq	19 DEC 2019	M
853	Brown, Steven	19 DEC 2019	M
825	Content, Damien	19 DEC 2019	M
828	Delamare, Graeme	19 DEC 2019	M
830	Desilva, Haley	19 DEC 2019	M
836	Edwards, Jacob	19 DEC 2019	M
835	Edwards, Justin	19 DEC 2019	M
839	Elliott, Katherine	19 DEC 2019	M
843	Farmer, Kristy	19 DEC 2019	M
852	Farnton, Steven	19 DEC 2019	M
857	Gray, Tenille	19 DEC 2019	M
863	Havlent, Tom	19 DEC 2019	M
826	Hushler, Elizabeth	19 DEC 2019	M

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.**

## 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.

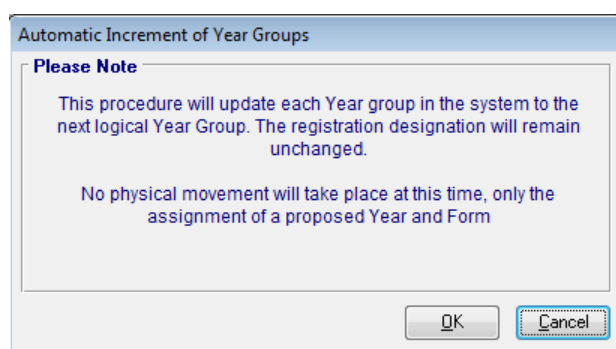
**Option 3 is recommended for most Primary Schools.**

**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

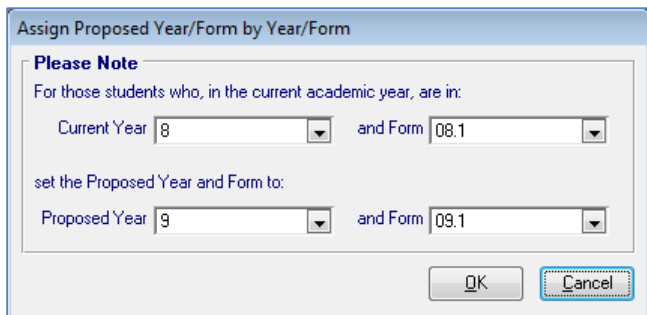
***Note: Registration designation is equivalent to Form.***

## 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)**



**End of Year Individual Assignment**

Year/Form Select  
Current Year/Form: 3/Room 3

Modifications  
Proposed Year Group: 4  
Proposed Form: Room 8  
Update Line(s)

Name	Proposed Year/Form
Anderson, Kurt	4/Room 8
Avery, Charmaine	4/Room 8
Connell, Melissa	4/Room 8
De Mamiel, Zola	4/Room 8
Em, Brenton	4/Room 8
Hayley, Martyn	4/Room 4
Hill, Tracey	4/Room 4
Janeic, Rasmi	4/Room 4
Kingston, Cain	4/Room 4
Oliver, Jared	4/Room 4
Smith, Cameron	4/Room 4

Select All Invert Selection Save Modifications Close

- 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**.

**End of Year Individual Assignment**

Year/Form Select  
Current Year/Form: 12/12.1

Modifications  
Proposed Year Group: Leaver  
Proposed Form: Not specified  
Update Line(s)

Name	Proposed Year/Form
Angus, Sally	Leaver/None
Brown, Patrick	Leaver/None
Cooper, Hayden	Leaver/None
English, Dion	Leaver/None
Gray, Verity	Leaver/None
Julian, Tristan	Leaver/None
Knight, Paul	Leaver/None
Leston, Ryan	Leaver/None
Lynn, Ashlyn	Leaver/None
Martin, Kristian	Leaver/None
Mentoring, Jess	Leaver/None
Moraru, Phillip	Leaver/None

Select All Invert Selection Save Modifications Close

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.**

**End of Year Individual Assignment**

Year/Form Select  
Current Year/Form: 6/Room 6

Modifications  
Proposed Year Group: Leaver  
Proposed Form: Not specified  
Update Line(s)

Name	Proposed Year/Form
Baker, Reuben	Leaver/None
Barbour, Ross	Leaver/None
Born, Tanya	Leaver/None
Chum, Nora	Leaver/None
Ellard, Kate	Leaver/None
Jones, Keith	Leaver/None
Loxton, Katherine	Leaver/None
Luck, Martin	Leaver/None
Mills, Mark	Leaver/None
Murphy, Tamara	Leaver/None
Richards, Mason	Leaver/None
Tep, Josh	Leaver/None

Select All Invert Selection Save Modifications Close

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

**End of Year Individual Assignment**

Year/Form Select  
Current Year/Form: 3/Room 3

Modifications  
Proposed Year Group: Leaver  
Proposed Form: Not specified  
Update Line(s)

Name	Proposed Year/Form
Anderson, Kurt	4/Room 4
Avery, Charmaine	Leaver/None
Connell, Melissa	4/Room 4
De Mamiel, Zola	4/Room 4
Em, Brenton	Leaver/None
Hayley, Martyn	4/Room 4
Hill, Tracey	4/Room 4
Janeic, Rasmi	4/Room 4
Kingston, Cain	4/Room 4
Oliver, Jared	Leaver/None
Smith, Cameron	Leaver/None

Select All Invert Selection Save Modifications Close

**End of Year Individual Assignment**

Year/Form Select  
Current Year/Form: 7/07.1

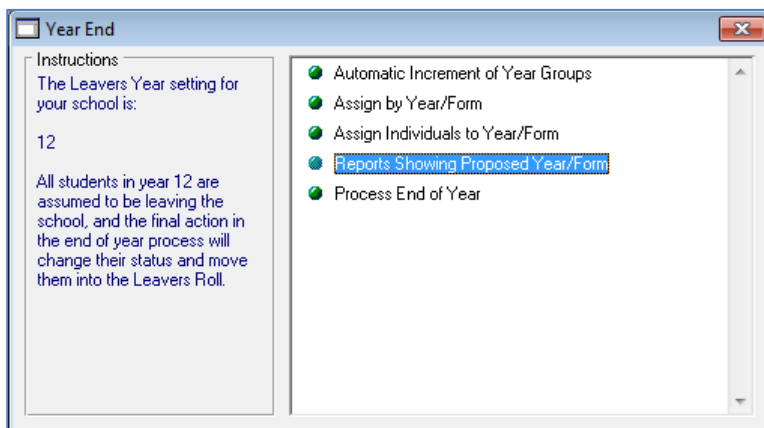
Modifications  
Proposed Year Group: Leaver  
Proposed Form: Not specified  
Update Line(s)

Name	Proposed Year/Form
Alkitik, Maria	8/08.2
Amber, Kylie	8/08.2
Andrews, Guy	Leaver/None
Arrowsmith, David	8/08.2
Arrowsmith, William	8/08.2
Atkins, Aaron	Leaver/None
Bandy, Brandy	8/08.2
Baverstock, Helen	8/08.2
Black, Mary	8/08.2
Brown, Lana	Leaver/None
Cooper, Marianne	8/08.2
Davids, Chelsea	8/08.2

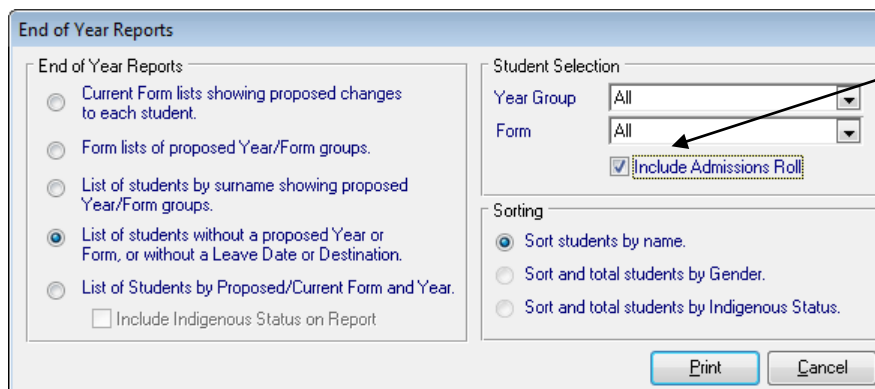
Select All Invert Selection Save Modifications Close

## 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.**

## 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

The 'Reports' window shows the 'Current Roll' report selected in the left sidebar. The main area displays the following configuration:

- Titles:** Main Title: 2019 Current Roll, Page Footer: (empty)
- Sort:** A list on the left contains 'DOB' and 'Gender'. A table on the right shows sort fields and checkboxes for 'Total' and 'Page'.
- Select:** A dropdown menu is empty. A 'New Query' button is present. The 'Totals only' checkbox is unchecked. The 'Show Reference Number' checkbox is checked.

	Sort Field	Total	Page
1	Year	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Form	<input type="checkbox"/>	<input type="checkbox"/>

Buttons at the bottom: Print, Cancel.

### Admin > Reports > Roll Reports > Year Lists Report

The 'Reports' window shows the 'Year Lists' report selected in the left sidebar. The main area displays the following configuration:

- Titles:** Main Title: 2019 Year Lists, Page Footer: (empty)
- Sort:** A list on the left contains 'DOB', 'Student Number', and 'Gender'. A table on the right shows sort fields and checkboxes for 'Total' and 'Page'.
- Select Year Group(s):** A list contains 'Not specified', 'K', 'P', '1', and '2'. The 'Including Student Number' radio button is selected.

	Sort Field	Total	Page

Buttons at the bottom: Print, Cancel.

## 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).

The screenshot shows a software window titled 'Reports'. On the left is a tree view under 'Form Lists' containing items like 'Standard Form List', 'Form List Summary' (highlighted), 'House Form List', 'Student Address Details', 'Parent/Guardian 1 Phone and A', 'Student Information Sheets', 'Student Information Cards', 'Student Update Form', 'Student Photos', 'Dinner Money Register', 'Teaching Set List', 'Solos and Siblings', and 'Manual Register List'. The main area on the right is for configuring the 'Form List Summary' report. It has a 'Titles' section with 'Main Title' set to '2019 Form List Summary' and an empty 'Page Footer' field. A checkbox 'Include Teacher Name(s) on Report' is checked. Below is a 'Summarise' section with two radio buttons: 'by Year Group' (selected) and 'by Form'. At the bottom of this section is an unchecked checkbox 'Include Family Representative totals'. At the very bottom of the window are 'Print' and 'Cancel' buttons.

### ***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.***

## Step 13: Process Year End

### IMPORTANT

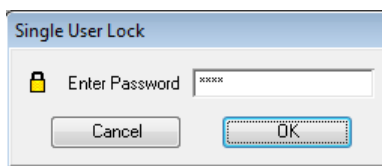
***If you have transferred your Admissions Roll students to the Current Roll before processing Year End, please contact the Customer Service Centre on 9264 5555 (metro), 1800 012 828 (regional) or [Customer.Service.Centre@education.wa.edu.au](mailto:Customer.Service.Centre@education.wa.edu.au)***

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

A dialog box titled "Single User Lock" with a lock icon. It contains a text field labeled "Enter Password" with "XXXX" as a placeholder. Below the text field are two buttons: "Cancel" and "OK".

- Type your password and click **OK**

A dialog box titled "Locked Message". It contains a text area with the message: "Integris and remote web services are currently unavailable while end of year processes are carried out." Below the text area is a label "Enter how long you expect the system to be locked for." followed by a text field containing "1.00" and the unit "hrs". At the bottom are two buttons: "View Users" and "OK".

- Click **OK**

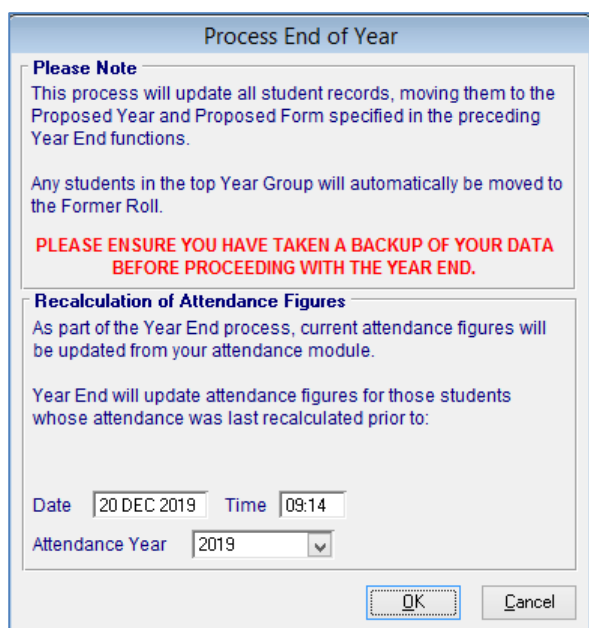
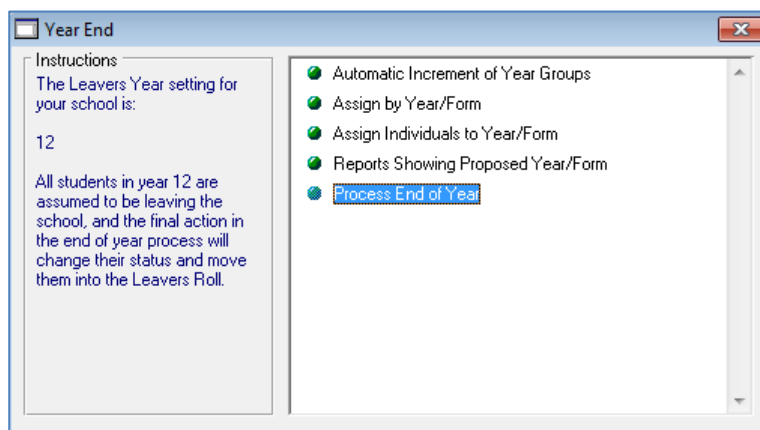
Single User lock is now activated and the icon appears in the top tool bar



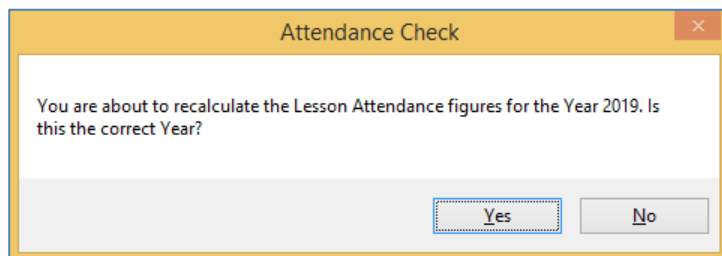
***Note: Integris will not let you perform a Year End update if it finds any students without a proposed Form or Year group, or if any Leavers do not have a Leave Date or Destination. It will produce a report of those students for whom such data needs to be entered. See Step 10 for details.***



## Admin > Year End > Process End of Year

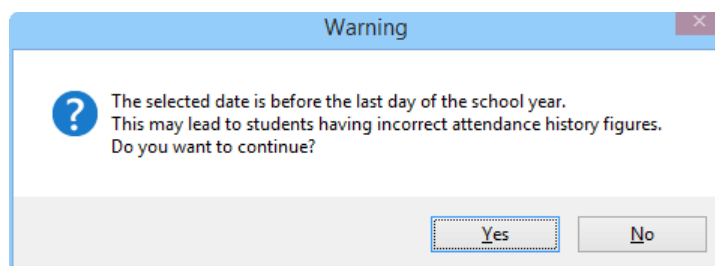


- Select the correct attendance year - **2019**
- Click **OK**

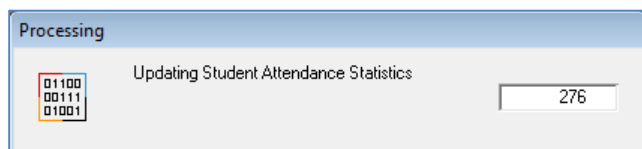


- Click **Yes**

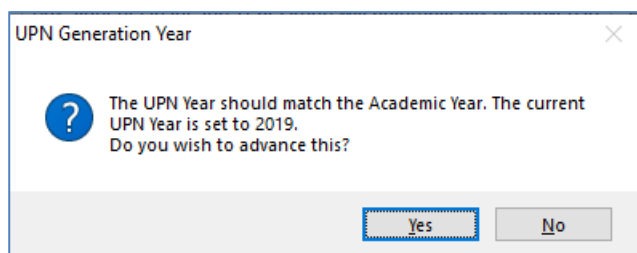
**Note: If you attempt to process Year End before the end of the attendance year has been completed, the following message will appear. End of year should be processed after the end of the attendance year.**



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.



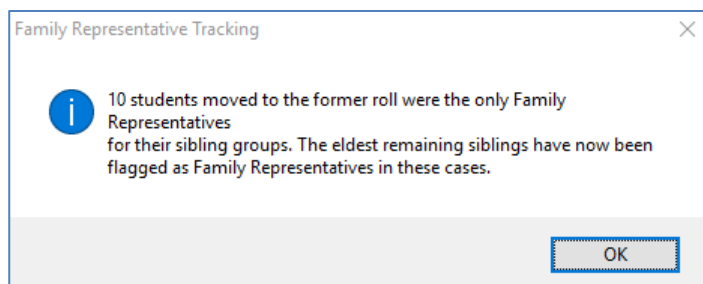
At the conclusion of this process the following message will be displayed:



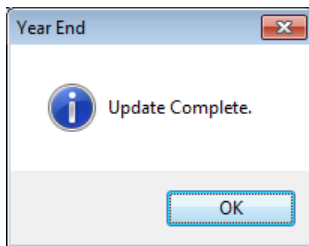
The current UPN Year should be set to 2019. You will be asked if you wish to advance the current UPN to 2020.

**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](mailto:Customer.Service.Centre@education.wa.edu.au) for assistance in correcting the UPN.**

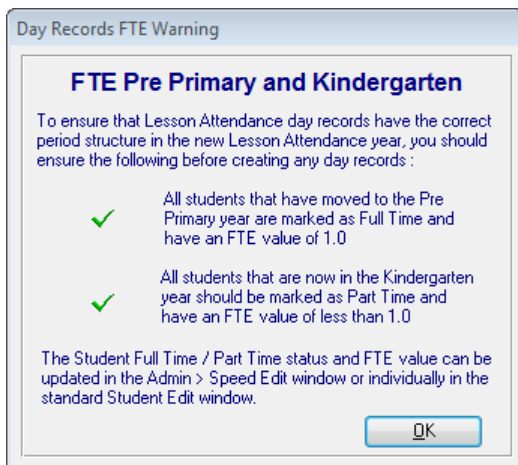
- Click **Yes** to continue



- Click **OK**



- 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](mailto:Customer.Service.Centre@education.wa.edu.au), before continuing.

## Step 15: Process Admissions Students

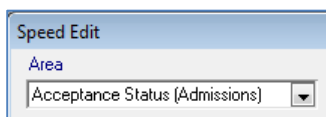
Adding students to the Admissions Roll (for example, incoming Pre-Primary students in a Primary School or incoming Year 7 students in a Secondary School) may be done at any time, but accepting them and transferring to the Current Roll should be undertaken **after** processing Year End. The Department 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*.

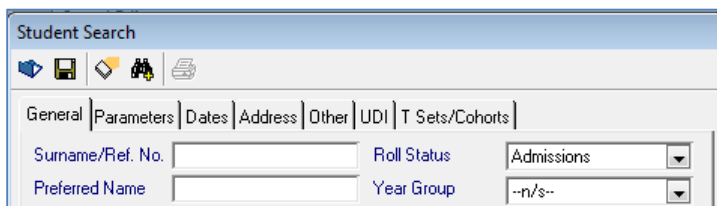
**Note: It is advisable to be in Single User Lock when transferring Admissions Students to the Current Roll.**

### Admin > Speed Edit

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

A screenshot of the 'Speed Edit' dialog box. It has a title bar 'Speed Edit' and a label 'Area'. Below the label is a dropdown menu currently showing 'Acceptance Status (Admissions)'.

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

A screenshot of the 'Student Search' dialog box. It has a title bar 'Student Search' and several tabs: 'General', 'Parameters', 'Dates', 'Address', 'Other', 'UDI', and 'T Sets/Cohorts'. The 'General' tab is selected. It contains two text input fields: 'Surname/Ref. No.' and 'Preferred Name'. To the right of these are two dropdown menus: 'Roll Status' (set to 'Admissions') and 'Year Group' (set to '--n/s--').

- Select all of the students for whom you wish to update their acceptance status

- Check **New Value** 

- Click  to Apply Changes

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

**Speed Edit**

Area: Acceptance Status (Admissions)

Select All | Deselect All | Invert Selection | Blanks | n/s

Ref.	Student Name	Value	Status
22	Freeborn, Jackson	YES	M
11	Gordes, Gordon	YES	M
9	Gordes, Marcus	YES	M
8	Hammond, Grant	YES	M
4	Jamilla, Jacob	YES	M
14	Jardine, Janet	YES	M
24	Kabulla, Izan	YES	M
3	Kelly, Billy	YES	M
21	Lamont, Isabelle	YES	M
13	Miller, Lynda	YES	M
12	Milliken, Molly	YES	M
20	Newbery, Naomi	YES	M
10	Pyatt, George	YES	M
44	Ramsden, Susan	YES	M
19	Wilson, Skye	YES	M
6	Winters, Craig	YES	M
17	Woo, Angela	YES	M
16	Woo, Tom	YES	M
15	Yardley, Teong	YES	M

New Value ☐ ☒

- 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

**Admissions Transfer to Current Roll**

This wizard will guide you through the process of transferring Admissions Roll students onto the Current Roll of your school.

Only those Admissions Roll students who have their 'Accepted?' checkbox ticked will be moved onto the Current Roll. This can be set either by editing the student within the Student Details area, or by selecting 'Acceptance Status (Admissions)' within Speed Edit.

Choose below how you would like to select the students to be transferred to the Current Roll.

☐ Transfer students with Acceptance Status of Yes, and Entry Date of


☒ Transfer all students with Acceptance Status of Yes, ignoring any Entry Dates that have been entered.  
Set the following Entry Date for all students who are transferred

Next student number will be 895

- 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**


**Admissions Transfer to Current Roll**


The following students will be transferred to the Current Roll.


If any students are listed below who you do not want to transfer to the Current Roll, select them within the list and click on the  button.

Ref.	Name	DOB	Gender	UPN	Entry Date	Transfer?
26	Hamish Angus	23 SEP 2007	Male		3 FEB 2020	
37	Valentine Antonello	27 JAN 2007	Female		3 FEB 2020	
1	Wendy Ballarat	22 FEB 2013	Female		3 FEB 2020	
34	Adrian Bayerstock	24 MAR 2008	Male		3 FEB 2020	
25	Caitlin Borsche	7 APR 2016	Female		3 FEB 2020	
23	Harry Carmelina	7 APR 2016	Male		3 FEB 2020	
46	Florence Davids	16 JUN 2005	Female		3 FEB 2020	
45	Paris Davids	16 JUN 2005	Female		3 FEB 2020	
18	Blake Dowling	20 SEP 2015	Male		3 FEB 2020	
38	Krystle Farmer	23 MAY 2008	Male		3 FEB 2020	
22	Jackson Freeborn	7 APR 2016	Male		3 FEB 2020	
11	Gordon Gordes	22 FEB 2013	Male		3 FEB 2020	
9	Marcus Gordes	25 MAR 2015	Female		3 FEB 2020	
8	Grant Hammond	22 FEB 2006	Male		3 FEB 2020	
4	Jacob Lamilla	23 MAY 2008	Male		3 FEB 2020	


Next student number will be 895

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

**Admissions Transfer** 


 **Transfer complete**

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

**Delete batches** 

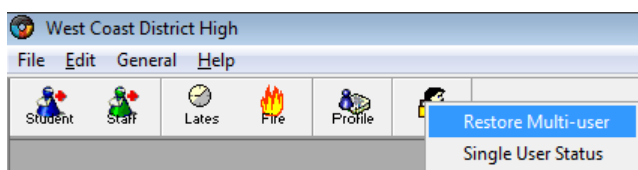
Do you wish to check for empty batches?

- Click Yes to delete any empty batches

**Delete Batch** 

The batch: Next Year is empty.  
Do you wish to delete it?

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

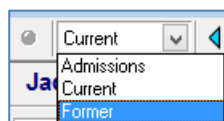


## Step 16: Reinstate Returning Students from the Former Roll to the Current Roll

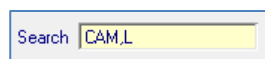
Where students have a Former Roll record but are returning to your school, they need to be reinstated to the Current Roll. Schools should always check whether any new enrolments have a Former Roll record and use this reinstating process to move them to the Current Roll.

### 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.

**Student** [X]

Former [v] [Icons]

**Leif Campbell ( 776 )** **Year 2 Form Room 2**

Date of Birth 31 MAY 2007 Age 12 Yrs 8 Mths Gender Male Teacher(s) Ms T Swindon Room USI UPN Z123456706047 Student No. 00000000 Central ID 99123456700000223	Address 18 Macquarie Ridge, PINEY WOODS, WA, 6999, Australia Phone 1 9395 4974 Phone 2 Fax Student Mob. Family Representative <input type="checkbox"/> Car Registration Original Roll Current E Mail Address
--	---

Contacts

Name	Phone	Address	Relation	Res	Par	Mail	Emrg	Notes	Fee
Ms Marjory Campbell	9395 4974	18 Macquarie Ridge, PINEY WOODS, WA	Mother	Yes	Yes	Yes	1	Yes	N
Mr Stefan Holste	9221 7845	42 Minigwal Loop, JOUIMONT, WA, 601	Father	No	Yes	No	2	No	N
Mr & Mrs Campbell		3 Fingerside Way, LONELY WATERS, WA	Grandparent	No	No	No	3	No	N

Res - Student Resident Par - Parental Responsibility Mail - Family Mail Marker Emrg - Emergency

Search [ ] [Icons]

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

Year [ 4 v ]

Form [ Room 4 v ]

- Click OK to save

To reinstate a student to the Current Roll:

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

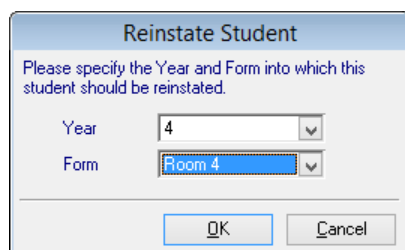
**Warning** [X]

? Are you sure you want to reinstate this record to the Current Roll?

[ Yes ] [ No ]



- 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



**Reinstate Student**

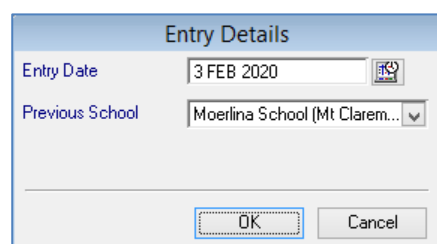
Please specify the Year and Form into which this student should be reinstated.

Year: 4

Form: Room 4

OK Cancel

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



**Entry Details**

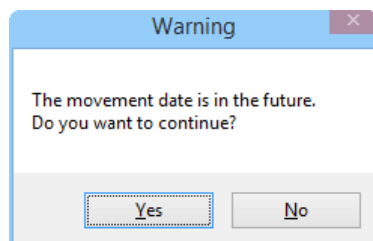
Entry Date: 3 FEB 2020

Previous School: Moerlina School (Mt Clarem...)

OK Cancel

- Click OK

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

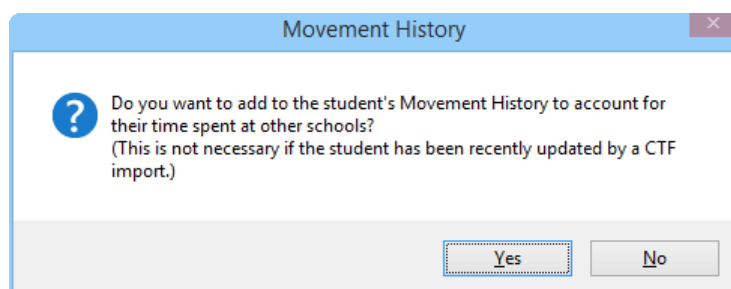


**Warning**

The movement date is in the future.  
Do you want to continue?

Yes No

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

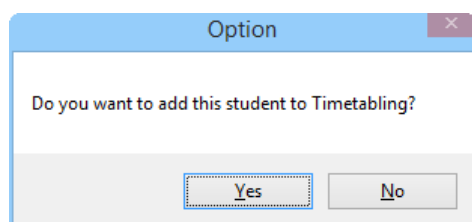


**Movement History**

Do you want to add to the student's Movement History to account for their time spent at other schools?  
(This is not necessary if the student has been recently updated by a CTF import.)

Yes No

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



**Option**

Do you want to add this student to Timetabling?

Yes No

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

**Student** (Current)

**Leif Campbell (776)** Year 4 Form Room 4

**Personal Details:**  
 Date of Birth: 31 MAY 2007  
 Age: 12 Yrs 8 Mths  
 Gender: Male  
 Teacher(s): Ms J Garden  
 Room:  
 USI:  
 UPN: Z123456706047  
 Student No.: 00000000  
 Central ID: 99123456700000223

**Address:**  
 18 Macquarie Ridge,  
 PINEY WOODS,  
 WA,  
 6999,  
 Australia

**Contact Information:**  
 Phone 1: 9395 4974  
 Phone 2:  
 Fax:  
 Student Mob.:  
 Family Representative: ☐  
 Car Registration:  
 E Mail Address:

**Contacts:**

Name	Phone	Address	Relation	Res	Par	Mail	Emrg	Notes	Fee
Ms Marjory Campbell	9395 4974	18 Macquarie Ridge, PINEY WOODS, WA, 6011	Mother	Yes	Yes	Yes	1	Yes	N
Mr Stefan Holste	9221 7845	42 Minigwal Loop, JOLIMONT, WA, 6011	Father	No	Yes	No	2	No	N
Mr & Mrs Campbell		3 Fingerside Way, LONELY WATERS, WA, 6011	Grandparent	No	No	No	3	No	N

Res - Student Resident Par - Parental Responsibility Mail - Family Mail Marker Emrg - Emergency

Search:

### 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

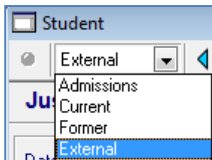
**Note: Community Kindergarten students enrolling in pre-primary for 2020 should be moved to the current roll.**

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



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

Student Justin Badely

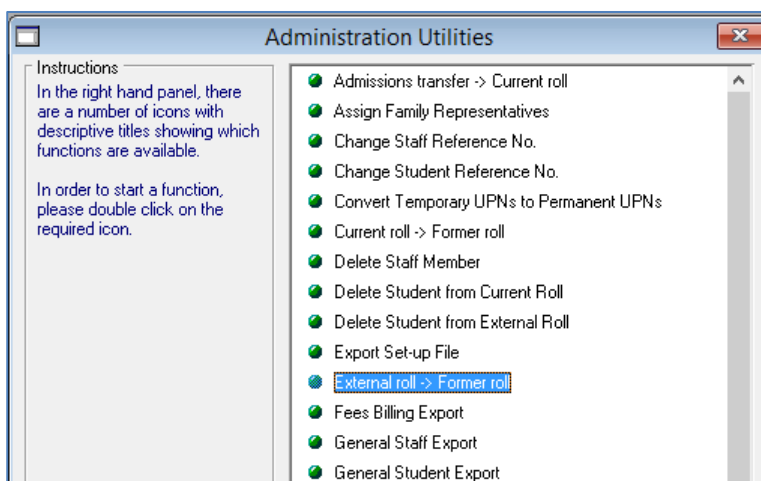
Personal | Family Group | **Additional** | Movement Hist. | Groups | UDI | Misc. | Attendance Hist. | Medical | Activities

Nationality	Not specified	Australian Citizen / Permanent Resident	<input checked="" type="checkbox"/>	In Receipt of Allowance	<input type="checkbox"/>
Religion	Not specified	Date Arrival Australia		Allowance Type	Not specified
First Language	English	Visa Grant No.		Visa Sub Class No.	
Indigenous Status	Not specified	Visa SC No. Expiry Date		Int. Fee Paying	
Study Type	Not specified	Birth Certificate Seen	<input type="checkbox"/>	Date Checked	
Main Lang OTE SAH	English	Country of Birth	Not specified	Passport Sighted	<input type="checkbox"/>
Mainly speak English at home?	<input type="checkbox"/>			Passport Number	
LBOTE	<input type="checkbox"/>	Entry Date	3 FEB 2019	Prev. School	
Out of State	<input type="checkbox"/>	Leave Date	19 DEC 2019	Destination	
Out of Area	<input type="checkbox"/>	Records Sent		Attendance	Current (Single registr...)
Access Restriction	<input type="checkbox"/>	Terms in this school	0	Boarder	<input type="checkbox"/>
Entered in SLP Program	<input type="checkbox"/>	Terms in other school(s)	0	Excluded	<input type="checkbox"/>
Educational Support Program	<input type="checkbox"/>	FTE	0.20	Part Time Status	<input type="radio"/> am <input type="radio"/> pm <input type="radio"/> n/a <input checked="" type="radio"/> Custom
EAL/D Stage	<input type="checkbox"/>	Documented Plan Review Date			
Documented Plan Completed	<input type="checkbox"/>	Documented Plan forwarded to DCP			
In Care of DCP	<input type="checkbox"/>				
Risk Management Plan	<input type="checkbox"/>				

OK Cancel

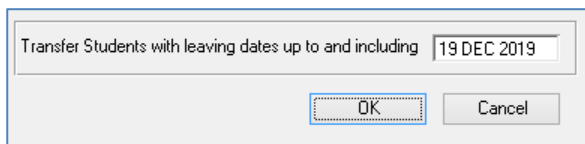
Run the External Roll to Former Roll Utility

## Admin > Utilities > External Roll to Former Roll



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

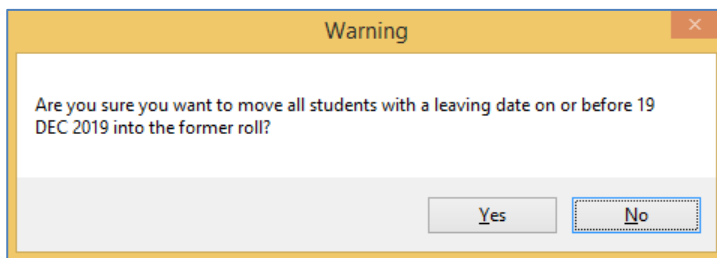
- Enter the Leave Date and Click **OK**



Transfer Students with leaving dates up to and including 19 DEC 2019

OK Cancel

- Click **Yes** to the Warning message

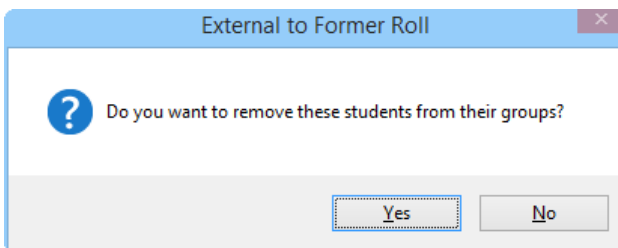


Warning

Are you sure you want to move all students with a leaving date on or before 19 DEC 2019 into the former roll?

Yes No

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

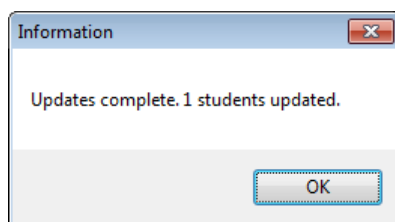


External to Former Roll

Do you want to remove these students from their groups?

Yes No

- Click **Yes**



Information

Updates complete. 1 students updated.

OK

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

View the Students on the Former Roll.

## General > Student Details

Student

Former

Justin Badely ( 924 ) Year 7 Form Not specified

Date of Birth 24 MAR 2008  
Age 11 Yrs 8 Mths  
Gender Male  
Teacher(s)  
Room  
USI  
UPN  
Student No. 00000000  
Central ID 19123456700001201

Address  
125 Watershed Road,  
FORRESTFIELD,  
WA,  
6587

Phone 1 96582154  
Phone 2  
Fax  
Student Mob.  
Family Representative ☐

Original Roll External  
E Mail Address

Car Registration

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

Contacts

Name	Phone	Address	Relation	Res	Par	Mail	Emrg	Notes	Fee
------	-------	---------	----------	-----	-----	------	------	-------	-----

Res - Student Resident Par - Parental Responsibility Mail - Family Mail Marker Emrg - Emergency

Search

## 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.

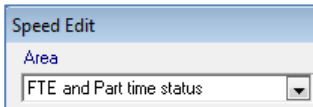
If you find any Kindergarten (K) students who have been entered with an FTE of 1.00 these students must have their FTE changed to 0.40, 0.50 or 0.60. As the system will determine this is a change to part-time status, indicators for AM, PM, N/A and Custom will become available. Kindergarten students should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

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**

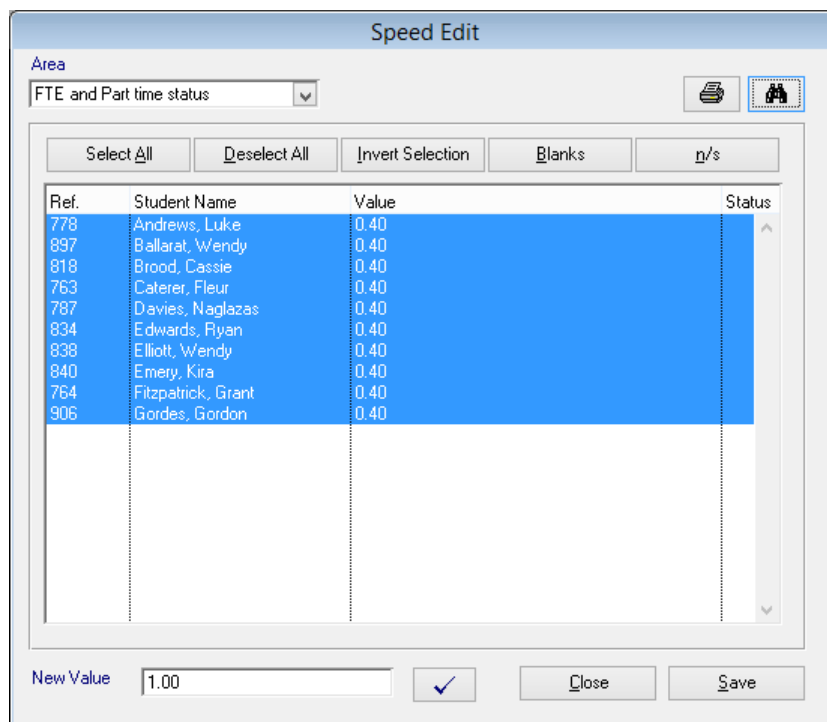


Speed Edit

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**



Speed Edit

Area

FTE and Part time status

Select All Deselect All Invert Selection Blanks n/s

Ref.	Student Name	Value	Status
778	Andrews, Luke	0.40	
897	Ballarat, Wendy	0.40	
818	Brood, Cassie	0.40	
763	Caterer, Fleur	0.40	
787	Davies, Naglazas	0.40	
834	Edwards, Ryan	0.40	
838	Elliott, Wendy	0.40	
840	Emery, Kira	0.40	
764	Fitzpatrick, Grant	0.40	
906	Gordes, Gordon	0.40	

New Value 1.00

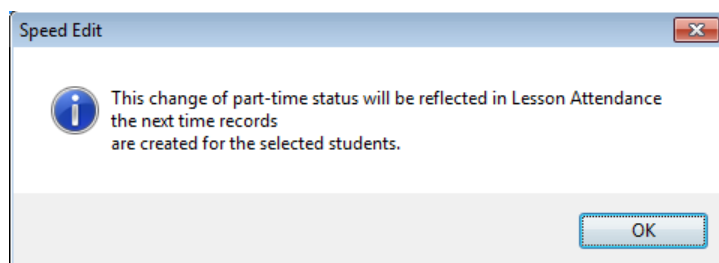
Close Save

- Click  to Apply Changes

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

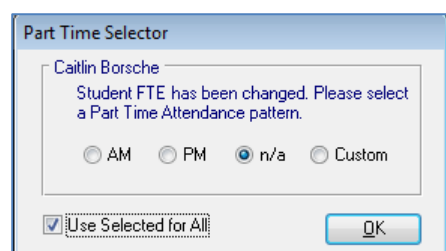
- Repeat the steps above to set the **FTE** for the Kindergarten students at **0.40**, **0.50** or **0.60**
- Click **Save**

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**

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




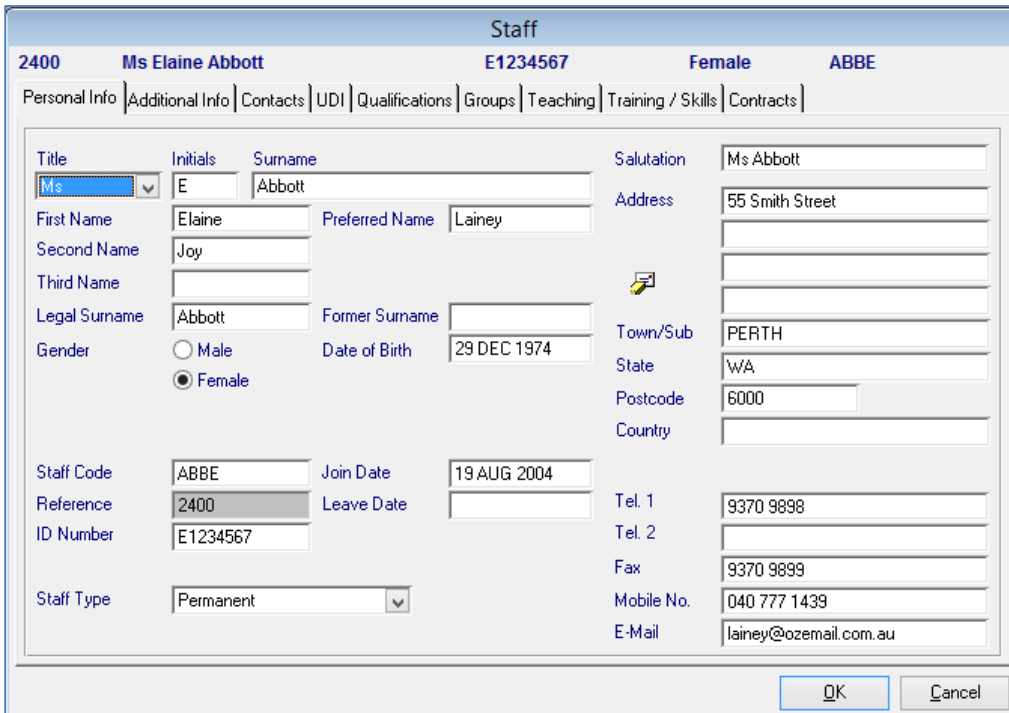
## Step 19: Update Staff Details

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



The screenshot shows the 'Staff' form for 'Ms Elaine Abbott'. The form is divided into several tabs: Personal Info, Additional Info, Contacts, UDI, Qualifications, Groups, Teaching, Training / Skills, and Contracts. The 'Personal Info' tab is active. The form contains the following fields:

Personal Info	
Title	Ms
Initials	E
Surname	Abbott
Salutation	Ms Abbott
First Name	Elaine
Second Name	Joy
Third Name	
Legal Surname	Abbott
Former Surname	
Gender	<input checked="" type="radio"/> Female
Date of Birth	29 DEC 1974
Address	55 Smith Street
Town/Sub	PERTH
State	WA
Postcode	6000
Country	
Staff Code	ABBE
Join Date	19 AUG 2004
Reference	2400
Leave Date	
ID Number	E1234567
Staff Type	Permanent
Tel. 1	9370 9898
Tel. 2	
Fax	9370 9899
Mobile No.	040 777 1439
E-Mail	lainey@ozemail.com.au

**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

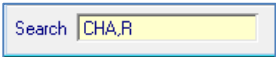



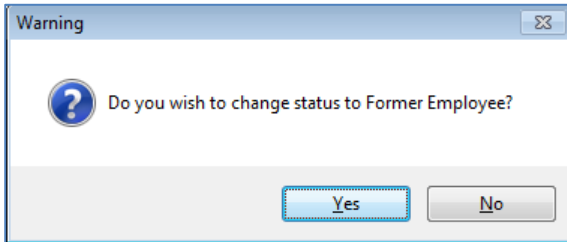
The screenshot shows the 'UDI' tab in the 'Staff' form. The form contains the following fields:

Description	Value
TRBWA number	12345678

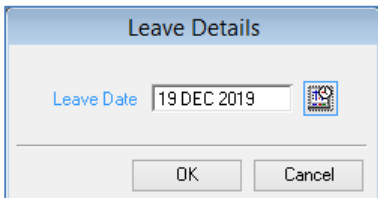
## 19.2 Move Staff who have left to the Previous Employee Roll

### General > Staff Details

- Search for a staff member who has left 
- Click Move Entry to Previous Employee Roll 



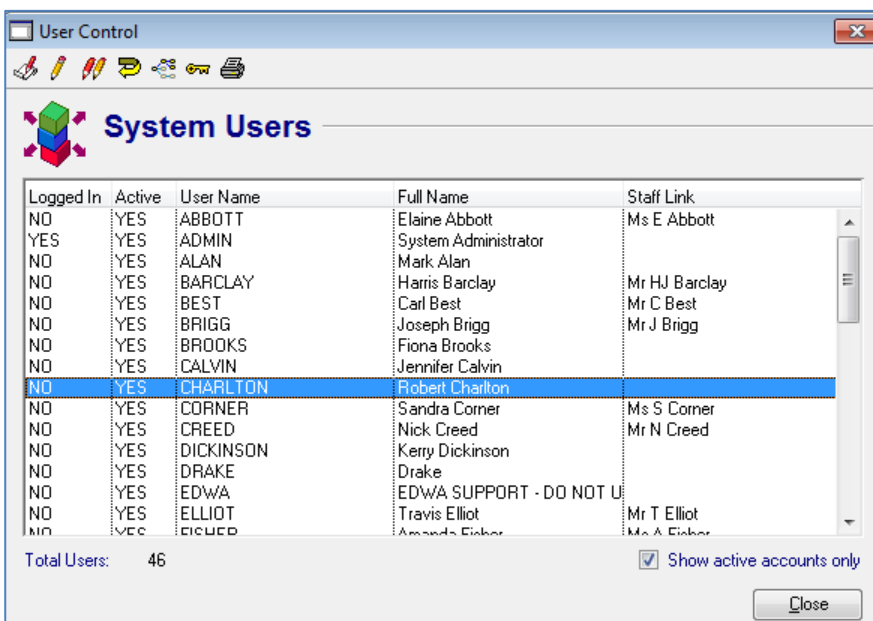
- Click **Yes**




- 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** 

- 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.

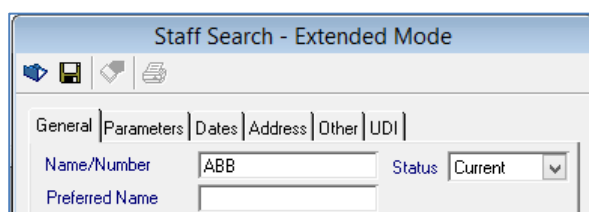
#### 19.4.1 Adding new staff details

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

- 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



Staff Search - Extended Mode

General | Parameters | Dates | Address | Other | UDI

Name/Number: ABB Status: Current

Preferred Name:

- Click **Find**

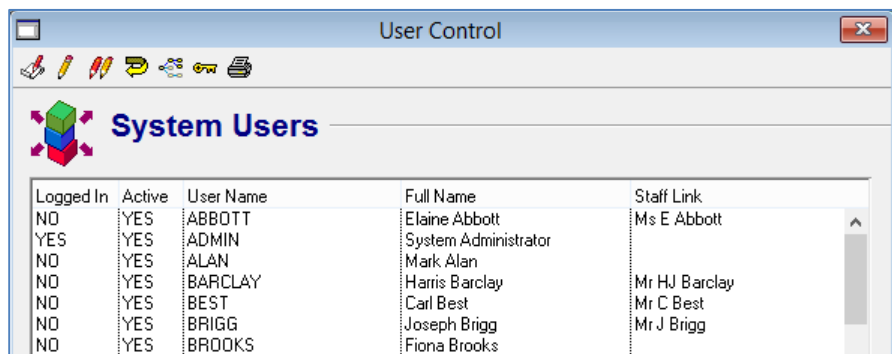


Staff Link: Ms E Abbott

- Click **OK**

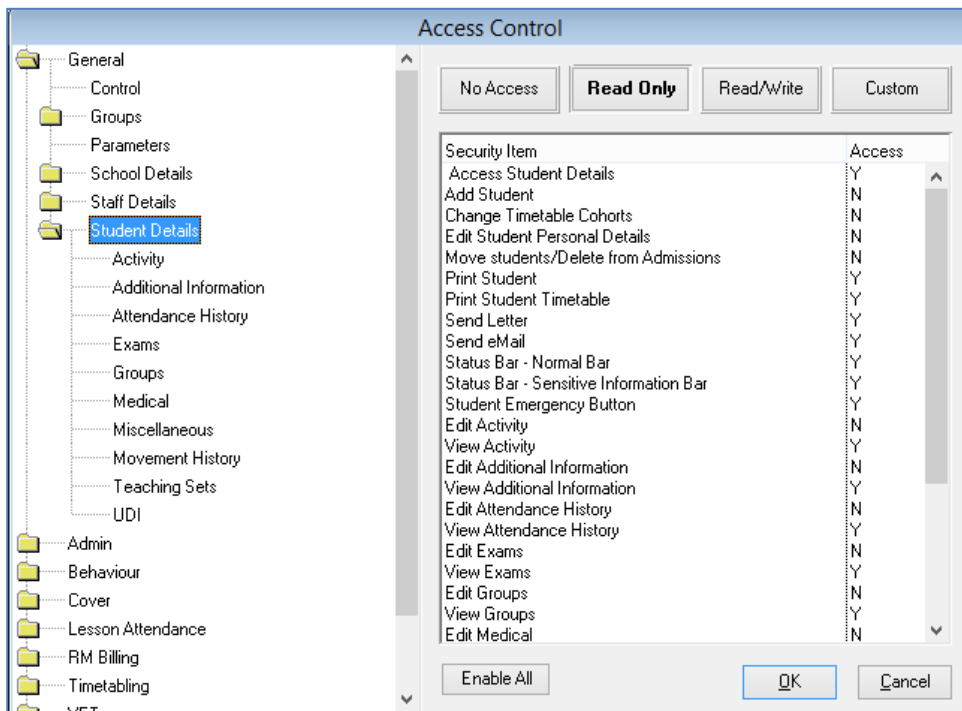
## 19.4.2 Assign Access Rights

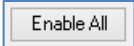
- Double click on the staff member's name in the **System User** window

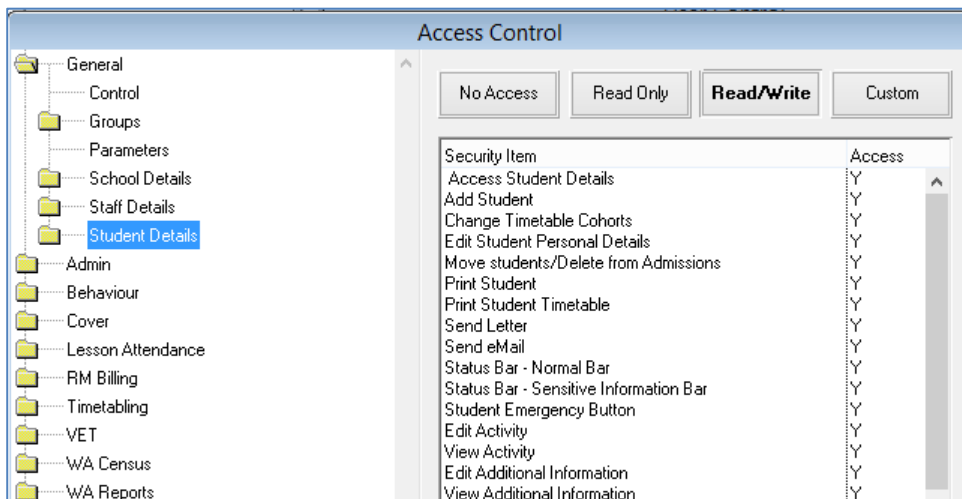


Logged In	Active	User Name	Full Name	Staff Link
NO	YES	ABBOTT	Elaine Abbott	Ms E Abbott
YES	YES	ADMIN	System Administrator	
NO	YES	ALAN	Mark Alan	
NO	YES	BARCLAY	Harris Barclay	Mr HJ Barclay
NO	YES	BEST	Carl Best	Mr C Best
NO	YES	BRIGG	Joseph Brigg	Mr J Brigg
NO	YES	BROOKS	Fiona Brooks	

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



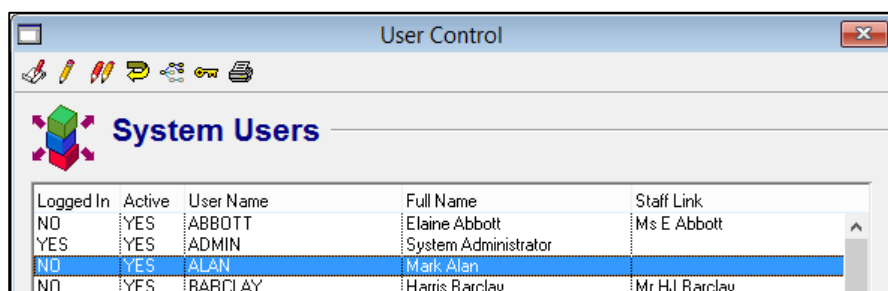
- Double click on an item to change the user's access rights
- Alternatively, click  to enable all items within the component




- Click **OK**

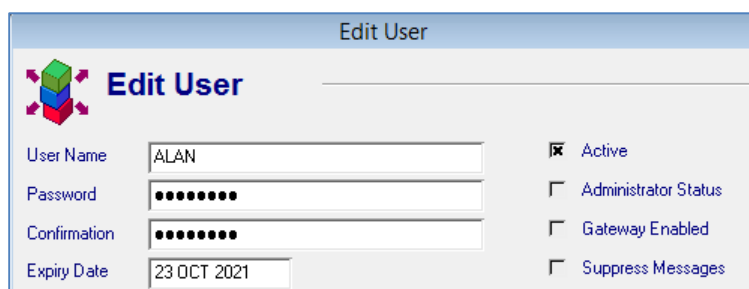
## 19.5 Edit Expiry Dates for Continuing Users

General > Control > Users



Logged In	Active	User Name	Full Name	Staff Link
NO	YES	ABBOTT	Elaine Abbott	Ms E Abbott
YES	YES	ADMIN	System Administrator	
NO	YES	ALAN	Mark Alan	
NO	YES	BARCLAY	Harris Barclay	Mr HJ Barclay

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



User Name	ALAN	<input checked="" type="checkbox"/> Active
Password	••••••••	<input type="checkbox"/> Administrator Status
Confirmation	••••••••	<input type="checkbox"/> Gateway Enabled
Expiry Date	23 OCT 2021	<input type="checkbox"/> Suppress Messages

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

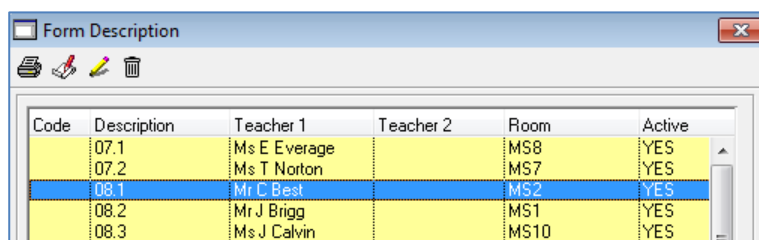
**Note:** It is recommended that the expiry dates are not set for the very end of the year, or the very beginning of the new year, as these are times when office staff are very busy.

## 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



Code	Description	Teacher 1	Teacher 2	Room	Active
07.1		Ms E Everage		MS8	YES
07.2		Ms T Norton		MS7	YES
08.1		Mr C Best		MS2	YES
08.2		Mr J Brigg		MS1	YES
08.3		Ms J Calvin		MS10	YES

- Click Edit 

- 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

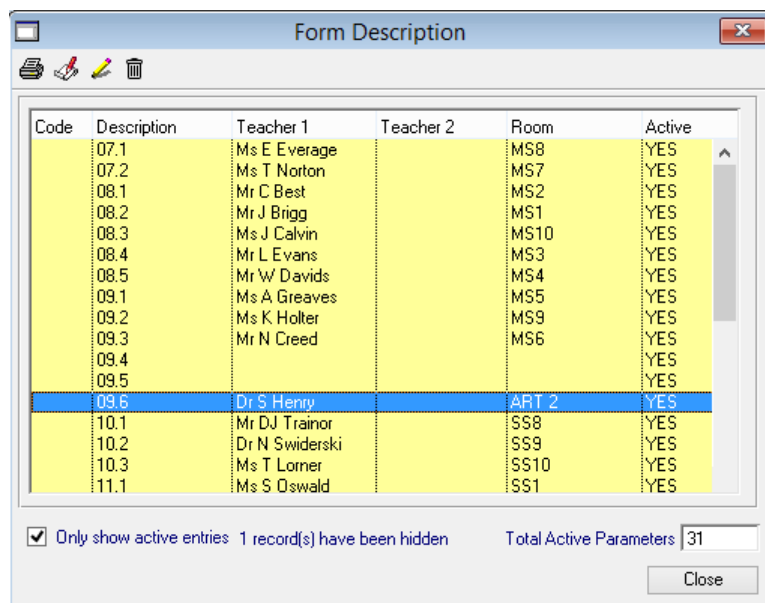
## Step 21: Deactivate Form Rooms

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



Code	Description	Teacher 1	Teacher 2	Room	Active
07.1	Ms E Everage			MS8	YES
07.2	Ms T Norton			MS7	YES
08.1	Mr C Best			MS2	YES
08.2	Mr J Brigg			MS1	YES
08.3	Ms J Calvin			MS10	YES
08.4	Mr L Evans			MS3	YES
08.5	Mr W Davids			MS4	YES
09.1	Ms A Greaves			MS5	YES
09.2	Ms K Holter			MS9	YES
09.3	Mr N Creed			MS6	YES
09.4					YES
09.5					YES
09.6	Dr S Henry			ART 2	YES
10.1	Mr DJ Trainor			SS8	YES
10.2	Dr N Swiderski			SS9	YES
10.3	Ms T Lerner			SS10	YES
11.1	Ms S Oswald			SS1	YES

☒ Only show active entries 1 record(s) have been hidden Total Active Parameters 31

Close

- Click 
- Untick the Active box
- Click **OK**

Active ☐



Form Description


Code	Description	Teacher 1	Teacher 2	Room	Active
07.1	Ms E Everage			MS8	YES
07.2	Ms T Norton			MS7	YES
08.1	Mr C Best			MS2	YES
08.2	Mr J Brigg			MS1	YES
08.3	Ms J Calvin			MS10	YES
08.4	Mr L Evans			MS3	YES
08.5	Mr W Davids			MS4	YES
09.1	Ms A Greaves			MS5	YES
09.2	Ms K Holter			MS9	YES
09.3	Mr N Creed			MS6	YES
09.4					YES
09.5					YES
09.6	Dr S Henry			ART 2	NO
10.1	Mr DJ Trainor			SS8	YES
10.2	Dr N Swiderski			SS9	YES
10.3	Ms T Lerner			SS10	YES
11.1	Ms S Oswald			SS1	YES

☒ Only show active entries 1 record(s) have been hidden Total Active Parameters 31

Close

## Step 22: Enter Repeating Students

### General > Student Details

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


Personal | Family Group | Additional | Movement Hist. | Groups | UDI | Misc. | Attendance Hist. | Medical | Activities

Disabilities Information


Disability  Detail

Other Disability  Detail


Other Disability  Detail


 [Click here for information about funding for students with disability](#)

Immunisation Details

Evidence provided ☒ Date Checked 15 AUG 2017  Vaccination Schedule Up to date

Measles Vaccination

MMR (1st dose at 12 months)  


MMR (2nd dose at 4 years)  

Measles Exclusion ☒

Diphtheria, Tetanus and Pertussis Vaccinations

DTPa (Immunisation completed to school entry) ☐

DTPa (Year 7) ☐

Date of last Tetanus vaccination  


Other Information

RI Withdrawn ☐

Religion Not specified

**Repeating Current Year** ☐

Visa Sub Class No

 OK Cancel

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

## 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.

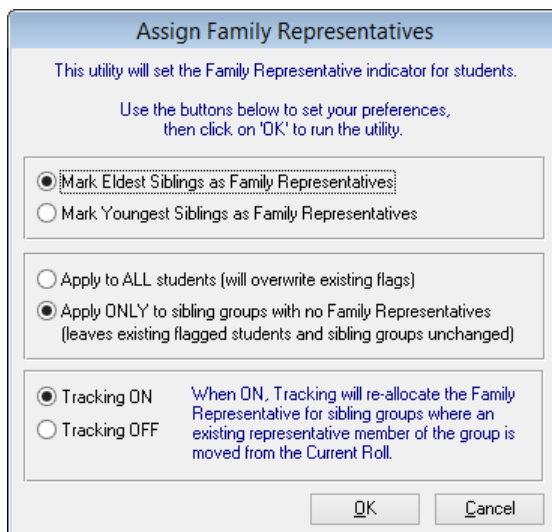
One or more members of a sibling group may be flagged as Family Representatives, although it is anticipated that the marker will usually be attached to the eldest or youngest sibling enrolled at the school.

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

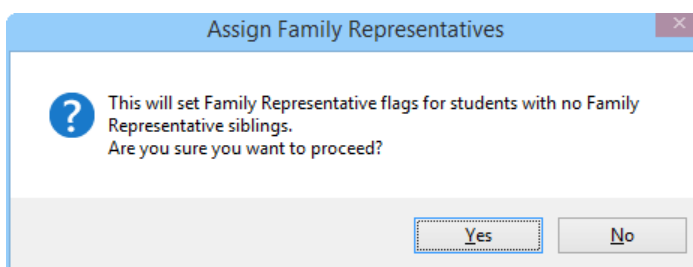


The 'Assign Family Representatives' dialog box contains the following settings:

- ☒ Mark Eldest Siblings as Family Representatives
- ☐ Mark Youngest Siblings as Family Representatives
- ☐ Apply to ALL students (will overwrite existing flags)
- ☒ Apply ONLY to sibling groups with no Family Representatives (leaves existing flagged students and sibling groups unchanged)
- ☒ Tracking ON: When ON, Tracking will re-allocate the Family Representative for sibling groups where an existing representative member of the group is moved from the Current Roll.
- ☐ Tracking OFF

Buttons: OK, Cancel

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



This will set Family Representative flags for students with no Family Representative siblings.  
Are you sure you want to proceed?

Buttons: Yes, No



Family Representatives have been assigned for the required sibling groups.

Button: OK

- Click **OK** to finish

## 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.

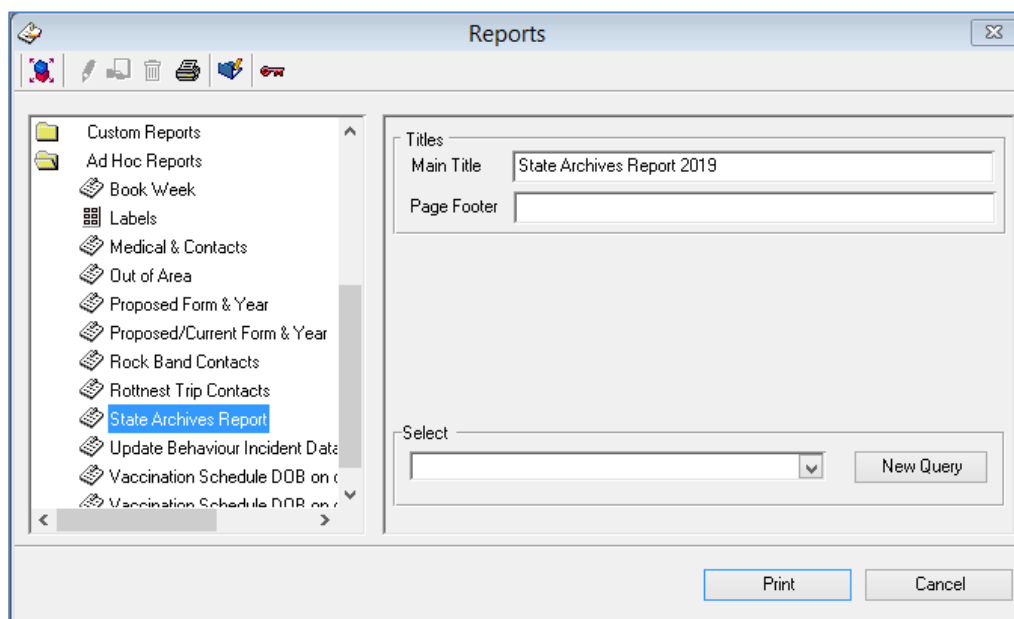
The process will include:

- 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--**

Student Search

General | Parameters | Dates | Address | Other | UDI | T Sets/Cohorts

Surname/Ref. No.  Roll Status --n/s--

Preferred Name  Year Group --n/s--

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

Student Search

General | Parameters | Dates | Address | Other | UDI | T Sets/Cohorts

Date of birth range  to

Birthday (Day, Month, Year)  --n/s--

From To

Entry Date

Leaving Date 1 JAN 2019 31 DEC 2019

Date Checked

Documented Plan forwarded to DCP Date

Documented Plan Review Date

☐ Not In Care of DCP ☐ Not Documented Plan Completed

☐ In Care of DCP ☐ Documented Plan Completed

☒ Either ☒ Either

☐ Show Inactive Parameters in Dropdown Lists

Find Close

- **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’.**

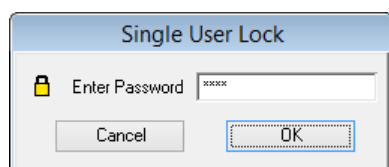
## Step 25: Set up New Attendance Year (if the Lesson Attendance module is loaded)

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 Integriris

### File > Single User Lock



- Type your password and click **OK**



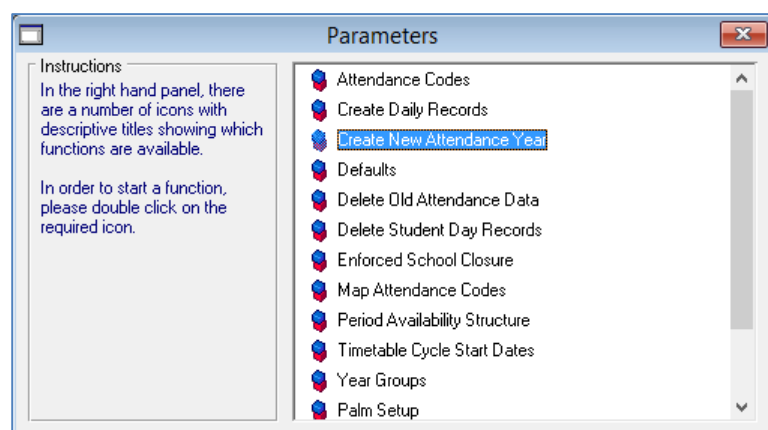
- Click **OK**

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

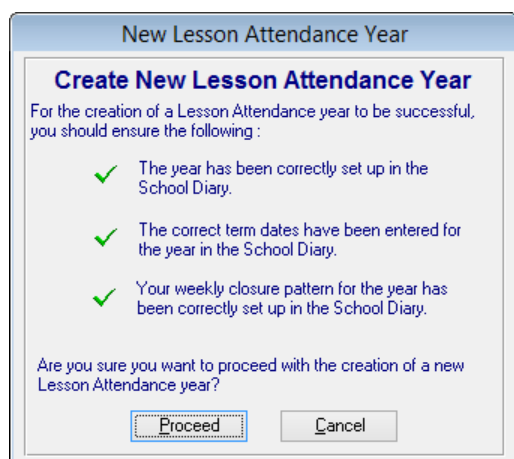


### Lesson Attendance > Parameters > Create New Attendance Year

- Double click on Create New Attendance Year



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



**New Lesson Attendance Year**

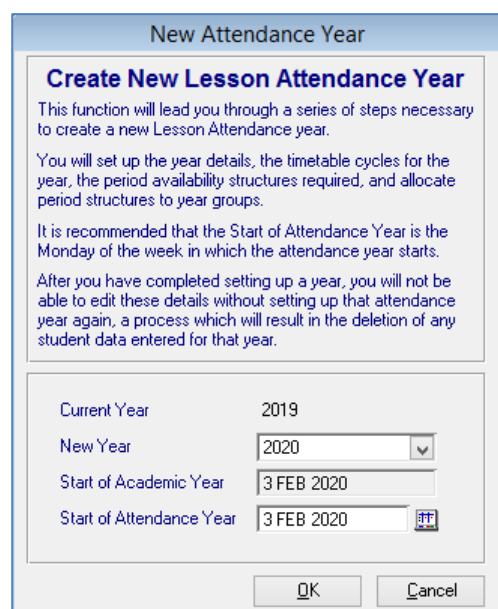
**Create New Lesson Attendance Year**

For the creation of a Lesson Attendance year to be successful, you should ensure the following :

- ✓ The year has been correctly set up in the School Diary.
- ✓ The correct term dates have been entered for the year in the School Diary.
- ✓ Your weekly closure pattern for the year has been correctly set up in the School Diary.

Are you sure you want to proceed with the creation of a new Lesson Attendance year?

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



**New Attendance Year**

**Create New Lesson Attendance Year**

This function will lead you through a series of steps necessary to create a new Lesson Attendance year.

You will set up the year details, the timetable cycles for the year, the period availability structures required, and allocate period structures to year groups.

It is recommended that the Start of Attendance Year is the Monday of the week in which the attendance year starts.

After you have completed setting up a year, you will not be able to edit these details without setting up that attendance year again, a process which will result in the deletion of any student data entered for that year.

Current Year	2019
New Year	2020
Start of Academic Year	3 FEB 2020
Start of Attendance Year	3 FEB 2020

**IMPORTANT: The Attendance Year always commences on a Monday.**

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.

**Student FTE Warning**

**Create New Year Student FTE Warning**

Students have been detected that do not have the expected FTE status for their year.

All students must have the correct Full time / Part time and FTE status before Creating Daily Records.

This report lists students who are in the Kindergarten year but have an FTE value of 1.0 and students who have an FTE value less than 1.0 but are not in the Kindergarten year.

Name	Year	Form	FTE	Expected FTE
Luke Andrews	K	K/P	1.00	<1.00
Cassie Brood	K	K/P	1.00	<1.00
<b>Total in Year K: 2</b>				
Dwayne Shaw	P	12.2	0.50	1.0
Keith Smothered	P	12.2	0.50	1.0
Katie Williams	P	12.2	0.50	1.0
Colin Simpson	P	12.3	0.50	1.0
Naglazes Davies	P	K/P	0.50	1.0
Grant Delphine	P	K/P	0.50	1.0
Ryan Edwards	P	K/P	0.50	1.0
Daniel Hulbert	P	K/P	0.50	1.0
Benn Kinnane	P	K/P	0.50	1.0
Robert Laurentsch	P	K/P	0.50	1.0
Marija Liebelt	P	K/P	0.50	1.0
Bunthy Lim	P	K/P	0.50	1.0
Michelle McNaughton	P	K/P	0.50	1.0
Lorena Pate	P	K/P	0.50	1.0
Trent Piller	P	K/P	0.50	1.0
Natasha Price	P	K/P	0.50	1.0
Dean Smith	P	K/P	0.50	1.0
Yazeed Jones	P	K/P	0.50	1.0
Kristel Marshall	P	K/P	0.50	1.0
Lauren Parkey	P	Room 1	0.50	1.0
Trisha Taleb	P	Room 1	0.50	1.0
<b>Total in Year P: 21</b>				
Candice Davies-Slate	1	Room 2	0.90	1.0
Sebastian De Jong	1	Room 2	0.90	1.0
Zola De Mamiel	1	Room 3	0.90	1.0
<b>Total in Year 1: 3</b>				

**Warning**

Do you want to quit the creation of the New Year to correct the FTE values for the listed students?

Select Yes to quit now or No to continue creating the New Year.

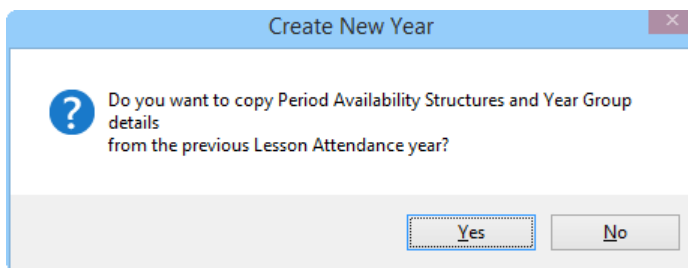
**Yes** **No**

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.





- 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.

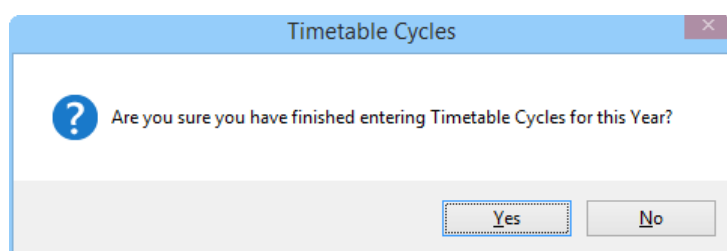
- View **Cycle Start Dates** and **Descriptions**

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
- Overtyping **Week 11 and 12** with **Holidays**
- Overtyping **Week 13** with **Term 2 Week 1**

Cycle No	Start Date	Description
1	Mon 3 FEB 2020	Term 1 Week 1
2	Mon 10 FEB 2020	Term 1 Week 2
3	Mon 17 FEB 2020	Term 1 Week 3
4	Mon 24 FEB 2020	Term 1 Week 4
5	Mon 2 MAR 2020	Term 1 Week 5
6	Mon 9 MAR 2020	Term 1 Week 6
7	Mon 16 MAR 2020	Term 1 Week 7
8	Mon 23 MAR 2020	Term 1 Week 8
9	Mon 30 MAR 2020	Term 1 Week 9
10	Mon 6 APR 2020	Term 1 Week 10
11	Mon 13 APR 2020	Holidays
12	Mon 20 APR 2020	Holidays
13	Mon 27 APR 2020	Term 2 Week 1

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



## 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**).

The "Period Structure for Lesson Attendance" window shows the "Primary" structure. It includes a toolbar with icons for saving, editing, deleting, and a dropdown menu. The "Period Structure Name" is set to "Primary". Below is a table with columns for Day No, Day, and a grid for periods. The table shows the first five days of the week (Mon-Fri) with periods 1 through 5. A key at the bottom explains the symbols: H (Home/Registration period in the morning), h (Home/Registration period in the afternoon), U (Period when students are not required to be in class), T (Teaching period in the morning), t (Teaching period in the afternoon), and B (Break period). Buttons for "Exit" and "Next" are at the bottom.

Day No	Day														
1	Mon	T	t												
2	Tue	T	t												
3	Wed	T	t												
4	Thu	T	t												
5	Fri	T	t												

**Key**  
H Home/Registration period in the morning      T Teaching period in the morning  
h Home/Registration period in the afternoon      t Teaching period in the afternoon  
U Period when students are not required to be in class      B Break period

### 25.1.2. Timetabling Period Structure

**Timetabling** links lesson attendance data directly to the timetable.

The "Timetabling Period Structure" window shows the "TIMETABLING" structure. It includes a toolbar with icons for saving, editing, deleting, and a dropdown menu. The "Period Structure Name" is set to "TIMETABLING". Below is a table with columns for Day No, Day, and a grid for periods. The table is mostly empty, with a message box stating "Periods will be calculated from the Timetabling module". A key at the bottom explains the symbols: H (Home/Registration period in the morning), h (Home/Registration period in the afternoon), U (Period when students are not required to be in class), T (Teaching period in the morning), t (Teaching period in the afternoon), and B (Break period). A "Close" button is at the bottom.

Day No	Day														
Periods will be calculated from the Timetabling module															

**Key**  
H Home/Registration period in the morning      T Teaching period in the morning  
h Home/Registration period in the afternoon      t Teaching period in the afternoon  
U Period when students are not required to be in class      B Break period

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

Cycle Name	Cycle description	No. Days	Cycle Active
2020-05	2020-05	5	YES

☒ Display Only Active Cycles

Day Name	Row	Start	End	Duration	Type	AM/PM
Monday	1	08:20	08:35	00:15	H	A
Monday	2	08:35	09:35	01:00	T	A
Monday	3	09:35	10:35	01:00	T	A
Monday	4	10:35	11:05	00:30	B	A
Monday	5	11:05	12:10	01:05	T	A
Monday	6	12:10	13:10	01:00	T	P
Monday	7	13:10	13:40	00:30	L	P
Monday	8	13:40	14:45	01:05	T	P
Tuesday	1	08:20	08:35	00:15	H	A
Tuesday	2	08:35	09:35	01:00	T	A
Tuesday	3	09:35	10:35	01:00	T	A
Tuesday	4	10:35	11:05	00:30	B	A
Tuesday	5	11:05	12:10	01:05	T	A
Tuesday	6	12:10	13:10	01:00	T	P
Tuesday	7	13:10	13:40	00:30	L	P
Tuesday	8	13:40	14:45	01:05	T	P

Row	Code	Label
1	H	Home Room
2	1	Lesson 1
3	2	Lesson 2
4	B	Recess
5	3	Lesson 3
6	4	Lesson 4
7	L	Lunch
8	5	Lesson 5

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 

**Create New Period Availability Structure**

**Create Period Availability Structure**

This wizard can be used to create new Period Structures, assuming that :  
 Home/registration periods are at the start of a session.  
 Lunch periods occur between the morning and the afternoon periods.  
 All days in the structure are the same.

After you have created the structure, you will have the opportunity to edit it.

If you would prefer to manually enter details into a blank Period Availability Structure, rather than using this wizard, use the **Create Blank** button.

New Period Availability Structure

Period Structure Name

Include a Morning Home/Registration Period ☐

Number of Morning Teaching Periods

Include an Afternoon Home/Registration Period ☐

Number of Afternoon Teaching Periods

Show Lunch as a Non-Teaching Period ☐

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

**Period Structure for Lesson Attendance**

2020

Period Structure Name

Day No	Day													
1	Mon	H	T	T	B	t	t	B	t					
2	Tue	H	T	T	B	t	t	B	t					
3	Wed	H	T	T	B	t	t	B	t					
4	Thu	H	T	T	B	t	B	t						
5	Fri	H	T	T	B	t	t	B	t					

<   >

**Key**

H	Home/Registration period in the morning	T	Teaching period in the morning
h	Home/Registration period in the afternoon	t	Teaching period in the afternoon
U	Period when students are not required to be in class	B	Break period

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

**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](mailto: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

Select Year Groups

Please select which Year Groups are to be included in Lesson Attendance.

<input type="checkbox"/>	0
<input checked="" type="checkbox"/>	K
<input checked="" type="checkbox"/>	P
<input checked="" type="checkbox"/>	1
<input checked="" type="checkbox"/>	2
<input checked="" type="checkbox"/>	3
<input checked="" type="checkbox"/>	4
<input checked="" type="checkbox"/>	5
<input checked="" type="checkbox"/>	6
<input type="checkbox"/>	7
<input type="checkbox"/>	8
<input type="checkbox"/>	9
<input type="checkbox"/>	10
<input type="checkbox"/>	11
<input type="checkbox"/>	12
<input type="checkbox"/>	15
<input type="checkbox"/>	16
<input type="checkbox"/>	17

Exit Next

#### District High School K-10

Select Year Groups

Please select which Year Groups are to be included in Lesson Attendance.

<input type="checkbox"/>	-3
<input type="checkbox"/>	-2
<input type="checkbox"/>	-1
<input type="checkbox"/>	0
<input checked="" type="checkbox"/>	K
<input checked="" type="checkbox"/>	P
<input checked="" type="checkbox"/>	1
<input checked="" type="checkbox"/>	2
<input checked="" type="checkbox"/>	3
<input checked="" type="checkbox"/>	4
<input checked="" type="checkbox"/>	5
<input checked="" type="checkbox"/>	6
<input checked="" type="checkbox"/>	7
<input checked="" type="checkbox"/>	8
<input checked="" type="checkbox"/>	9
<input checked="" type="checkbox"/>	10
<input type="checkbox"/>	11
<input type="checkbox"/>	12

Exit Next

#### Secondary High School 7-12

Select Year Groups

Please select which Year Groups are to be included in Lesson Attendance.

<input type="checkbox"/>	1
<input type="checkbox"/>	2
<input type="checkbox"/>	3
<input type="checkbox"/>	4
<input type="checkbox"/>	5
<input type="checkbox"/>	6
<input checked="" type="checkbox"/>	7
<input checked="" type="checkbox"/>	8
<input checked="" type="checkbox"/>	9
<input checked="" type="checkbox"/>	10
<input checked="" type="checkbox"/>	11
<input checked="" type="checkbox"/>	12
<input type="checkbox"/>	15
<input type="checkbox"/>	16
<input type="checkbox"/>	17
<input type="checkbox"/>	18
<input type="checkbox"/>	19
<input type="checkbox"/>	20

Exit Next

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

#### Primary School (K-6)

Year Groups Using Lesson Attendance

2020

Year Group	Period Structure	Start Date	End Date
K	Primary	3 FEB 2020	17 DEC 2020
P	Primary	3 FEB 2020	17 DEC 2020
1	Primary	3 FEB 2020	17 DEC 2020
2	Primary	3 FEB 2020	17 DEC 2020
3	Primary	3 FEB 2020	17 DEC 2020
4	Primary	3 FEB 2020	17 DEC 2020
5	Primary	3 FEB 2020	17 DEC 2020
6	Primary	3 FEB 2020	17 DEC 2020

Exit Save Cancel

## District High School (K-10)

Year Groups Using Lesson Attendance

2020

Year Group	Period Structure	Start Date	End Date
3	Primary	3 FEB 2020	17 DEC 2020
4	Primary	3 FEB 2020	17 DEC 2020
5	Primary	3 FEB 2020	17 DEC 2020
6	Primary	3 FEB 2020	17 DEC 2020
7	TIMETABLING	3 FEB 2020	17 DEC 2020
8	TIMETABLING	3 FEB 2020	17 DEC 2020
9	TIMETABLING	3 FEB 2020	17 DEC 2020
10	TIMETABLING	3 FEB 2020	17 DEC 2020

Save Cancel

OR

Year Groups Using Lesson Attendance

2020

Year Group	Period Structure	Start Date	End Date
3	Primary	3 FEB 2020	17 DEC 2020
4	Primary	3 FEB 2020	17 DEC 2020
5	Primary	3 FEB 2020	17 DEC 2020
6	Primary	3 FEB 2020	17 DEC 2020
7	Secondary	3 FEB 2020	17 DEC 2020
8	Secondary	3 FEB 2020	17 DEC 2020
9	Secondary	3 FEB 2020	17 DEC 2020
10	Secondary	3 FEB 2020	17 DEC 2020

Save Cancel

## Secondary High School (7-12)

7	TIMETABLING	3 FEB 2020	17 DEC 2020
8	TIMETABLING	3 FEB 2020	17 DEC 2020
9	TIMETABLING	3 FEB 2020	17 DEC 2020
10	TIMETABLING	3 FEB 2020	17 DEC 2020
11	TIMETABLING	3 FEB 2020	17 DEC 2020
12	TIMETABLING	3 FEB 2020	17 DEC 2020

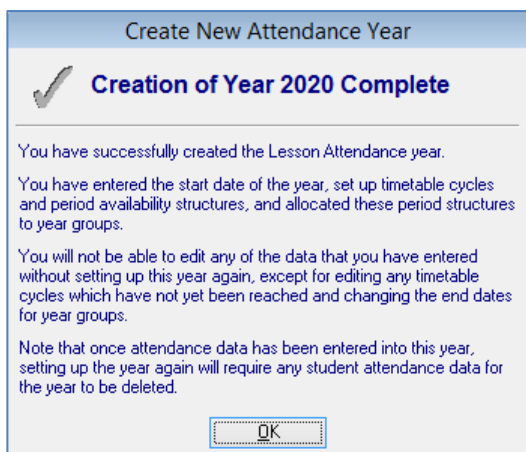
Exit Save Cancel

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

Year Groups

Are you sure you have finished entering Year Group settings for this Year?

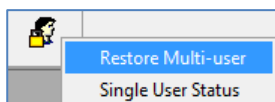
Yes No



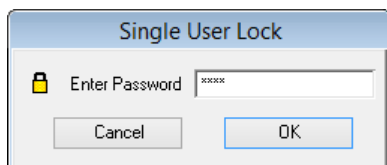
- Click **OK**

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

## Step 26: Notification of Transfer

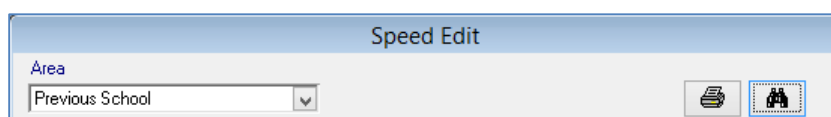
Schools are reminded that they must provide written or electronic notification of the date an enrolment commences, to the school where the new student was previously enrolled. This includes notification to Primary Schools when students are enrolling in Secondary Schools for the first time.

**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.**

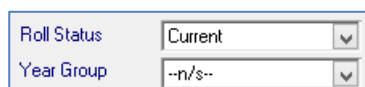
### Confirming Enrolment to the Previous School

#### Admin > Speed Edit

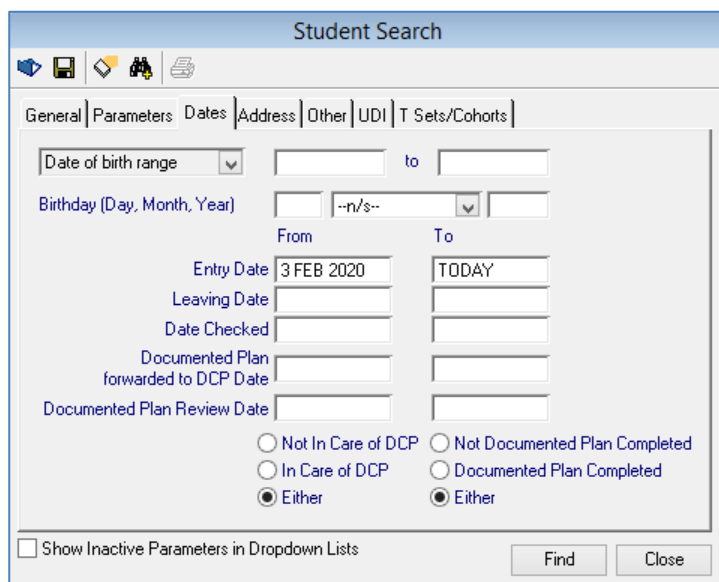
- Select **Previous School** from the **Area** drop down list



- 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**



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

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

**Speed Edit**

Area: Previous School

Select All Deselect All Invert Selection Blanks n/s

Ref.	Student Name	Value	Status
913	Lamont, Isabelle	Albany P.S.	
906	Gordes, Gordon	Albany P.S.	
910	Jardine, Janet	Albany P.S.	
923	Yardley, Teong	Albany P.S.	
915	Milliken, Molly	Albany P.S.	
920	Winters, Craig	Applecross S.H.S. (Ardross)	
908	Hammond, Grant	Applecross S.H.S. (Ardross)	
917	Pyatt, George	Armada Christian College (Bedfordale)	
914	Miller, Lynda	Armada P.S.	
912	Kelly, Billy	Ashfield P.S.	
909	Jamilla, Jacob	Ashfield P.S.	
921	Woo, Angela	E Busselton P.S.	
922	Woo, Tom	E Busselton P.S.	
776	Campbell, Leif	Moerlina School (Mt Claremont)	
897	Ballarat, Wendy	Northern Territory	
895	Angus, Hamish	Nullagine P.S.	
787	Davies, Naglazas	Orana Catholic School (Willetton)	
763	Caterer, Fleur	Other Sources	
818	Brood, Cassie	Pingrup P.S.	

New Value

Close Save

- 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	Armada Christian College (Bedfordale)	
914	Miller, Lynda	Armada 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.

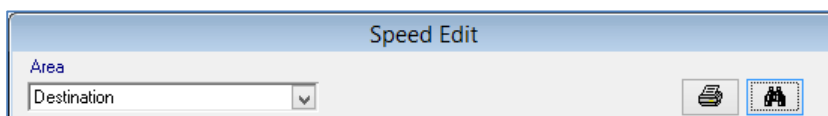
## Step 27: Checking the Destination of Former Students

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.

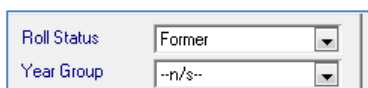
Schools should check the Transfer Note details to ensure the correct destination school has been entered against the student's record. To assist in this process, schools can print a list of all students on the Former Roll displaying their destination school.

### Admin > Speed Edit

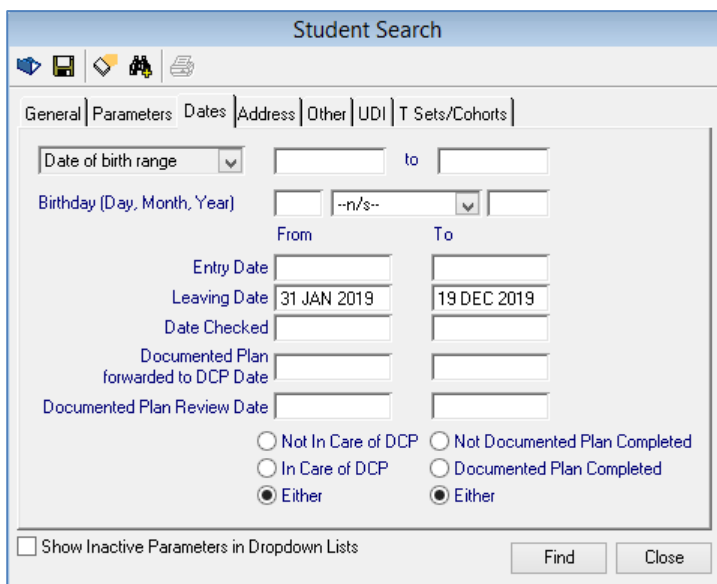
- Select **Destination** from the **Area** drop down list



- 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**

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

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)	
820	Avery, Charmaine	Neerabup P.S.	
868	Brokenshire, Pamela	Nollamara Christian Academy	
59	Emery, Blake	Northampton D.H.S.	
873	Fuller, Blade	Northampton D.H.S.	
285	Price, Charlie	Not specified	
290	Pryor, Cassie	Not specified	
280	Piper, Michelle	Not specified	
275	Peterson, Candice	Not specified	
270	Peroni, Adam	Not specified	
250	Otter, Lauren	Not specified	
295	Ramsay, Damien	Not specified	
247	Oscar, Jillian	Not specified	
245	Quinn, Matthew	Not specified	

- To print the list, select the printer icon



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/>**

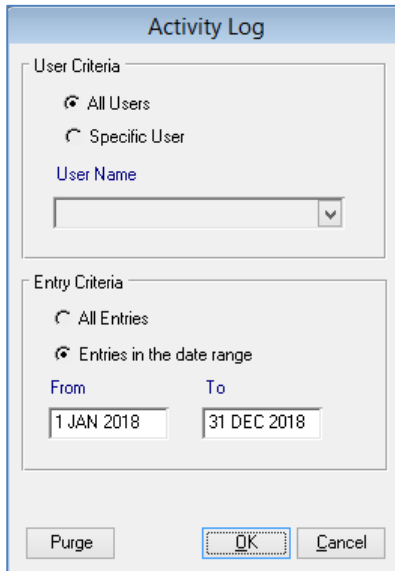
**If a student returns after being moved to the former roll in the year end process, contact the Customer Service Centre on 9264 5555 (metro), 1800 012 828 (regional) or [Customer.Service.Centre@education.wa.edu.au](mailto:Customer.Service.Centre@education.wa.edu.au)**

## Step 28: Purge the Audit Trail

### General > Control > Audit

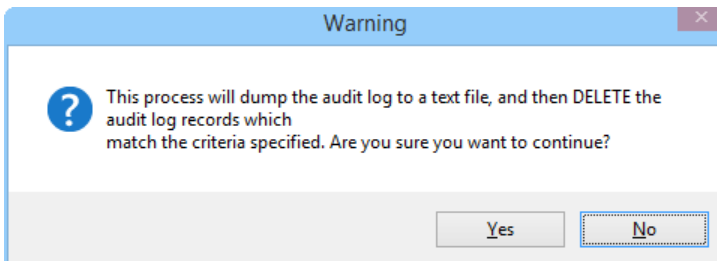
- Select **All Users** and **Entries in the date range**.
- Enter the date range for the calendar year e.g. **1 JAN 2018** to **31 DEC 2018**

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



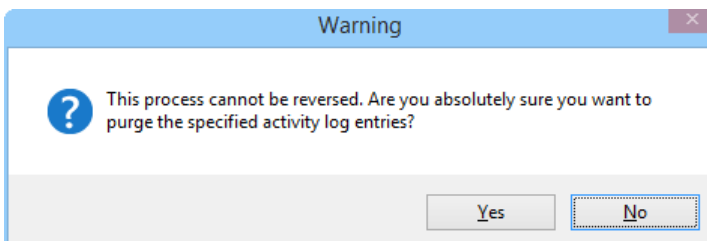
The 'Activity Log' dialog box is shown. It has two sections: 'User Criteria' and 'Entry Criteria'. In 'User Criteria', 'All Users' is selected. In 'Entry Criteria', 'Entries in the date range' is selected. The 'From' date is '1 JAN 2018' and the 'To' date is '31 DEC 2018'. At the bottom, there are three buttons: 'Purge', 'OK', and 'Cancel'. The 'OK' button is highlighted with a dashed border.

- Click **Purge**



A 'Warning' dialog box is shown. It contains a question mark icon and the text: 'This process will dump the audit log to a text file, and then DELETE the audit log records which match the criteria specified. Are you sure you want to continue?'. At the bottom, there are two buttons: 'Yes' and 'No'. The 'No' button is highlighted with a dashed border.

- Click **Yes**



A 'Warning' dialog box is shown. It contains a question mark icon and the text: 'This process cannot be reversed. Are you absolutely sure you want to purge the specified activity log entries?'. At the bottom, there are two buttons: 'Yes' and 'No'. The 'No' button is highlighted with a dashed border.

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

**Contact the Customer Service Centre on 9264 5555 (metro), 1800 012 828 (regional) or [Customer.Service.Centre@education.wa.edu.au](mailto: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](mailto: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.

Home	Find a service	Intranet A to Z	<input type="text" value="SIS"/>	
------	----------------	-----------------	----------------------------------	---