

# CIVICA

Integris Admin Year End Training Notes



## Document Versions

Ver.	Reason	Who	Date
1.1	Creation of new course – Admin -EOY	Fiona Brooks (RMA-WA)	08/10/05
1.2	Minor changes as requested by DET	Fiona Brooks (RMA-WA)	10/10/05
1.3	Minor corrections following DET review	Paul Gabelich (RMA-WA)	17/10/05
1.4	Changes for 6.85	Sidney Loke (RMA – WA)	19/07/06
1.5	Changes requested by DET	Susan Richardson (RMA- WA)	14/08/06
1.6	Changes following DET review	Kerry Dickinson (RMA-WA)	18/10/06
1.7	Changes requested by DET	Susan Richardson (RMA- WA)	26/10/06
1.8	New Format & changes for 2008	Sidney Loke (RMA – Vic)	28/06/07
1.9	Added new State Archives Report step	Sidney Loke (RMA – Vic)	17/07/07
2.0	Changes requested by DET	Kerry Dickinson and Susan Richardson (RMA-WA)	23/08/07
2.1	Updated following further DET feedback	Paul Gabelich (RMAP)	29/08/07
2.2	Changes requested by DET (v6.88.31)	Anthony Harris (RMA-WA)	15/07/08
2.3	Minor amendments	Shauna Henry (RMA-WA)	22/07/08
2.4	Minor amendments	Kerry Dickinson (RMA-WA)	22/07/08
2.5	Updated after DET review of Fact Sheet	Kerry Dickinson (RMA-WA)	25/07/08
2.6	Updated after DET reviews of Fact Sheet	Kerry Dickinson (RMA-WA)	07/08/08
2.7	Updated after DET review	Kerry Dickinson (RMA-WA)	15/08/08
2.8	Minor corrections	Susan Richardson (RMA-WA)	17/09/08
2.9	Further corrections	Susan Richardson (RMA-WA)	18/09/08
3.0	Update for 2009	Joshua Kragt (RMA-WA)	30/06/09
3.1	Proofed with minor corrections	Shauna Henry (RMA-WA)	24/07/09
3.2	Updated after training	Joshua Kragt (RMAP)	21/09/09
3.3-3.9	Updated for 2010	Susan Richardson (RM Ed)	13/09/10
4.0	Proofed with minor corrections	Derek Mathieson (RM Ed)	14/09/10
4.1	Updated for 2011	Derek Mathieson (RM Ed)	13/07/11
5.0	Updated after DoE Review	Derek Mathieson (RM Ed)	14/07/11
6.0	Updated to match EOY Fact Sheet	Derek Mathieson (RM Ed)	19/07/11
7.0	Minor corrections after Training and Updated Term Dates for 2012	Derek Mathieson (RM Ed)	09/09/11

7.1	Updated for 2012	Derek Mathieson (Civica Ed)	20/07/12
8.0	Revised/Published after DoE Review	Derek Mathieson (Civica Ed)	06/08/12
9.0	Minor Correction and re-published	Derek Mathieson (Civica Ed)	12/09/12
9.1-9.5	Updated for 2013	Derek Mathieson (Civica Ed)	10/07/13
10.0	Published for 2013	Derek Mathieson (Civica Ed)	23/07/13
11.0	Minor Corrections and re-published	Derek Mathieson (Civica Ed)	26/09/13
12.0	Updated for 2014 and v7.00.10	Shauna Henry (Civica Ed)	25/09/14
13.0	Updated for 2015 and v7.03.10	Shauna Henry (Civica Ed)	24/07/15
14.0	Updated for 2016 and v7.06.10	Derek Mathieson (Civica Ed)	28/06/16

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# 1 Introduction

Today's course outlines the procedures for processing Administration Manager Year End. Certain steps assume that users have been provided with the SIS Backup Wizard for copying the current year's data files. If you do not have this application please contact Customer Service Centre (contact details below) before proceeding with the Year End process.

**Customer Service Centre (CSC)**

**Phone (CSC) Metro: 9264 5555      Country: 1800 012 828**

**Fax (CSC) 9264 4701**

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

Much of the Year End process can be set up in Term 3 or early in Term 4 with the final Year End being run at a time that suits the school. That is, either at the end of the current year or at the beginning of the next year.

## **IMPORTANT:**

***These training notes are intended for use in the SIS Admin Year End Training course. SIS users should use the Admin EOY Fact Sheet when completing the End of Year process.***

## 1.1 Course Outline

Time	Content
8:45 a.m.	Coffee and Introductions
9:00 a.m.	Introduction to Administration Manager Year End Updating the datafile Creating a checklist for Forms Assigning a Leavers year Backing up the datafile School calendar Define Semester/Timetabling Periods Form descriptions Set up Leavers Increment proposed years and forms Reports for proposed years and forms Student lists for Reference Process Year End
10:30 a.m.	Morning Tea
10:45 a.m.	Check Year End Process Admissions Students Move External Roll Students to the Former Roll Update Form Descriptions Changing Student FTE Check repeating students Assign Family Representatives Print State Archives Report Set up New Attendance Year Notification of Transfer Check student's Destination School Purge Audit Trails
12:00	Close

## 1.2 Logging on to the System

### Activity:

To log on, double click on **Integris Training** on the desktop



Type **ADMIN** as the **User Name <Tab>**  
Enter the **Password: keys**

A screenshot of the 'School Management Solutions - Integrated Database' login window. The window title is 'School Management Solutions - Integrated Database' with version '7.06.10 (02/06/16)' and 'Extended Mode'. It contains a login form with 'User Name' (ADMIN) and 'Password' (\*\*\*\*) fields, a 'Login' button, and a 'Quit' button. Below the form is the 'RM' logo and the 'Datafile Path: C:\KEYS\INTEGRIS\RMDB\TRGDAT1\INTEGRIS.DF1'.

Click on **Login** or press **<Enter>**

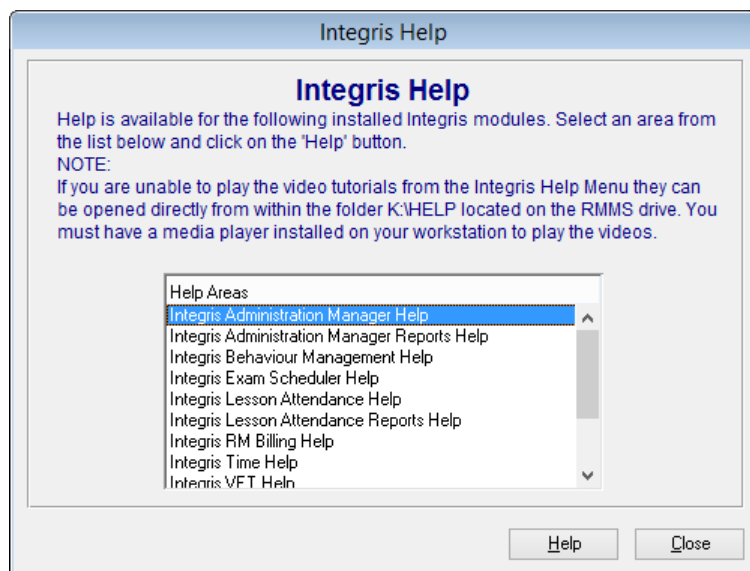
In schools, each user has their own user name and password, which enables access to particular sections of the software as determined by the school administration.

**Note: It is strongly recommended that you change your password once a month.**

## 1.3 Help Contents and Index

### Activity:

Top Toolbar > Help > Help Contents and Index



Double click ***Integris Administration Manager Help***

View

Close Help

### ***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 2017)***

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

## 2 Checklist for Year End Processes

The following list outlines the steps involved in the Year End process. Much of the process can be set up early in Terms 3 or 4, with the final Year End being run at a time that suits your school that is 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 year for Secondary Schools	
4.	Check the leavers year in School Details	
5.	Back up the datafile	
6.	Set up the school calendar for the new year	
7.	Defining Semester/Timetabling Periods	
8.	Set up form descriptions for the new year	
9.	Set up Leavers	
10.	Increment students' proposed years and proposed forms	
11.	Print reports showing proposed years and forms	
12.	Print student lists for future reference	
13.	Back up Data File	
14.	Process Year End	
15.	Check Year End was successful	
16.	Process Admissions Students	
17.	Move External Roll Students to the Former Roll	
18.	Changing Student FTE	
19.	Update Staff Details	
20.	Update Form Descriptions	
21.	Repeating Student; check they are flagged	
22.	Assign Family Representatives	
23.	Print State Archives Report	
24.	Set up New Attendance Year	
25.	Notification of Transfer	
26.	Checking Student's Destination School	
27.	Purge the Audit Trail	

Part A	Can be completed prior to 15 <sup>th</sup> December 22015
Part B	To be completed after 15 <sup>th</sup> December 2016

### 3 Year End Process

#### 4 Step 1: Bring your Datafile up to Date

This means that students who are coming to the school next year have been added to the Admissions Roll and students who have left have been moved to the Former Roll. If the Lesson Attendance module is being used, make sure attendance data is up to date. The following activities will cover these tasks.

#### **IMPORTANT**

***Do not move leavers to the Former Roll. This is carried out automatically when processing the year end.***

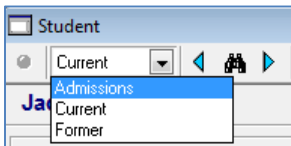
#### **Activity:**

##### **General > Student Details**

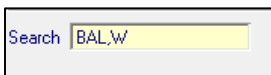
##### **Moving a student to the Current Roll**


A student on the Admissions roll, Wendy Ballarat, has started at the school and needs to be moved to the Current Roll.

- Change the **Roll Status** to **Admissions**



##### **Find Wendy Ballarat**



- Type the first three letters of her surname, followed by a comma
- Press <Enter>
- Click Edit 

- Check the **Accepted** ☒ Accepted? box
  - Allocate her to **Form Room 1**
  - Allocate her a **House**
- Complete her address details

Student Wendy Ballarat

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

Surname: Ballarat  
 Legal Surname: Ballarat  
 Prev. Surname:   
 1st Name: Wendy  
 2nd Name:   
 3rd Name:   
 Preferred Name: Wendy  
 eMail Address:   
 Year: 1  
 Reference: 1  
 Central ID:   
 Form: Room 1  
 House: Blue  
☒ Accepted?  
 DOB: 26 FEB 2009  
 Male ☐ Female ☒  
 Awaiting Notification of UPN ☐  
 UPN:   
 Student No.: 00000000  
 USI:   
 Address:   
 Town/Sub: PINEY WOODS  
 State: WA  
 Postcode: 6999  
 Country:   
 Tel. 1:   
 Tel. 2:   
 Fax:   
 Student Mob.:   
 Car Registration:   
 Family Representative ☐

OK Cancel

- Go to the Miscellaneous Tab
- Enter her immunisation details as shown below

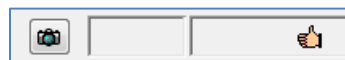
Immunisation Details


Evidence provided ☒ Date Checked:   
 Vaccination Schedule: Fully Completed

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:   
☒ Accepted?

- Click **OK**
  - Click **Yes**
- View the Accepted Icon



**Note:** An accepted icon  will appear in the Student window in the bottom task bar. The Speed Edit function can be used to edit the Acceptance Status (Admissions) for more than one student.

## Admin > Utilities

- Double-click **Admissions Transfer to Current Roll**
- Select **Transfer all students with Acceptance Status of Yes, ignoring any Entry Dates that have been entered.**

**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 879

<< Back   Next >>   Cancel

- Use TODAY'S date as the **Enrolment Date**
- Click **Next**

**Admissions Transfer to Current Roll**

The following students will be transferred to the Current Roll.

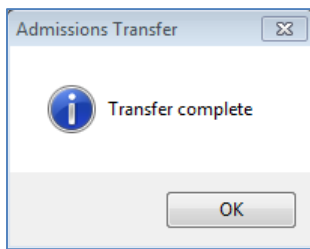
If any students are listed below who you do not want to transfer to the Current Roll, select them within the list and click on the X button.

Ref.	Name	DOB	Gender	UPN	Entry Date	Transfer?
1	Wendy Ballarat	25 FEB 2010	Female		30 JAN 2017	✓

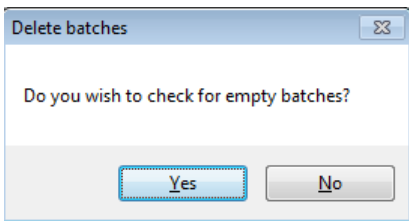
Next student number will be 895

<< Back   Finish   Cancel

- Click **Finish**



- Click **OK**



- Click **No** to check for empty batches

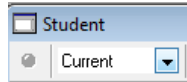
## Activity:

### General > Student Detail

#### Moving a student to the Former Roll

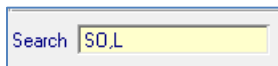
Linda So is leaving the school today. Move her to the Former Roll.

- Ensure the Roll Status is Current



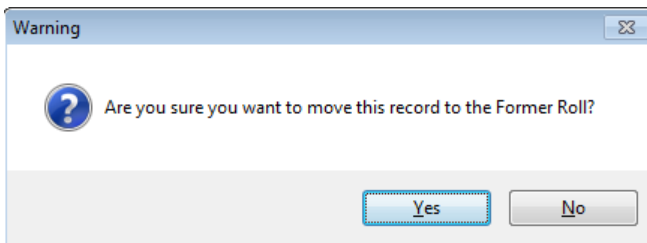
A screenshot of a dropdown menu titled 'Student'. The menu is open, showing a list with 'Current' selected and highlighted.

- Find Linda So



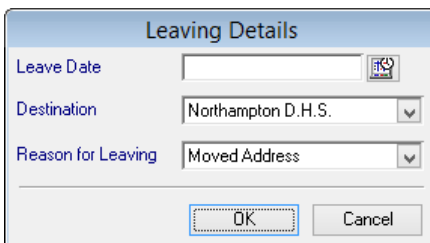
A screenshot of a search bar with the text 'SO,L' entered.

- Click on **Move Student to Former Roll**



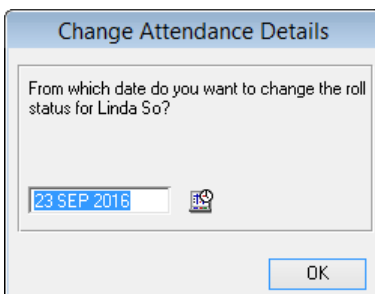
A screenshot of a 'Warning' dialog box. It contains a question mark icon and the text: 'Are you sure you want to move this record to the Former Roll?'. At the bottom, there are two buttons: 'Yes' and 'No'.

- Click **Yes**
- Enter **TODAY's** date and the following



A screenshot of a 'Leaving Details' dialog box. It has three fields: 'Leave Date' (with a calendar icon), 'Destination' (a dropdown menu showing 'Northampton D.H.S.'), and 'Reason for Leaving' (a dropdown menu showing 'Moved Address'). At the bottom, there are two buttons: 'OK' and 'Cancel'.


- Click **OK** and **Yes** to remove the student from their groups
- Enter TODAY's date regarding changes to the roll status

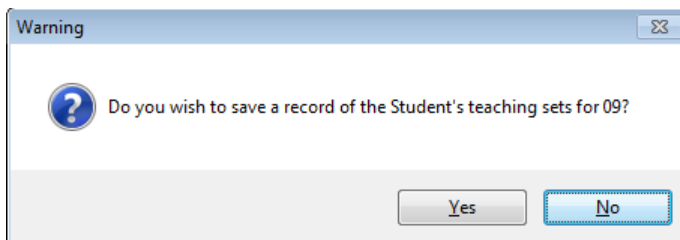
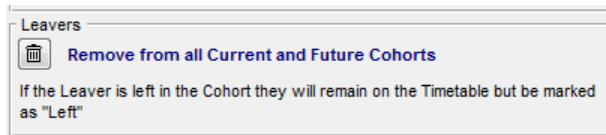


A screenshot of a 'Change Attendance Details' dialog box. It contains the text: 'From which date do you want to change the roll status for Linda So?'. Below this is a date field showing '23 SEP 2016' with a calendar icon. At the bottom, there is an 'OK' button.


- Click OK

**Note: The default date is the date up to when the Daily Records have been created. At school, the date entered would be the date the student actually left.**

- Remove Linda from her cohort by clicking 



- Click **Yes** to the message

**Note: By clicking on  rather than using the Remove from Cohort feature, a report is created in Timetabling which lists her subjects and teaching sets. If the student returns to the school, they may be reinstated rather than re enrolled.**

## Activity:

### General > Student Details

#### Moving Multiple Students to the Former Roll

Cameron Smith and Kane Smith are moving to Jurien Bay, so they need to be moved to the Former Roll.

- Ensure the Roll Status is **Current**


Search


- Find **Cameron Smith**
- Right click in the Contacts area


Name	Phone	Address	Relation	Res	Par	Mail	Emrg	Notes	Fee
Mr Peter Smith	9222 1113	6 Argus Cross, LEEDERVILLE WA 6011	Father	Yes	Yes	Yes	1	No	Y
Mrs Gloria Smith	9222 1113	6 Argus Cross, LEEDERVILLE						No	N
KANE Smith	9395 6090	6 Argus Cross, PINEY WOOD						No	

Save Column Widths  
Default Column Widths  
Make Siblings the Browse Set

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

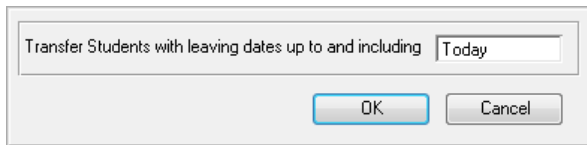
- Choose **Make Siblings the Browse Set**
- Click Edit 
- Click on the **Additional** tab
- Enter today's date as the **Leave Date** and **Jurien DHS** as the **Destination**

Entry Date	<input type="text" value="1 AUG 2012"/>	Prev. School	<input type="text"/>
Leave Date	<input type="text"/>	Destination	<input type="text" value="Jurien D.H.S."/> 
Records Sent	<input type="text"/>	Attendance	<input type="text" value="Current (Single registr..."/>
Terms in this school	<input type="text" value="21"/>	Boarder	<input type="checkbox"/>
Terms in other school(s)	<input type="text" value="0"/>	Excluded	<input type="checkbox"/>

- Click **OK**
- Click Next Student 
- Enter the same **Leave Date** and **Destination** for Kane's records
- Click **OK**

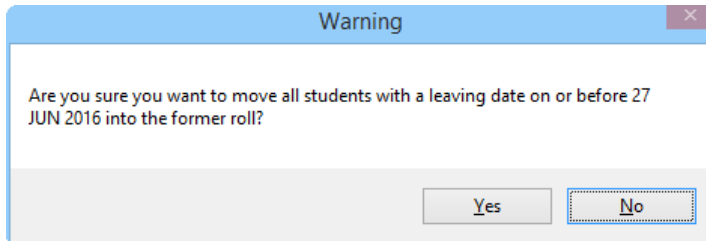
## Admin > Utilities

- Double-click **Current Roll to Former Roll**
- Enter TODAY'S date



Transfer Students with leaving dates up to and including

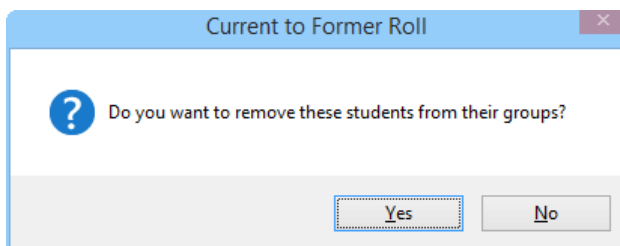
- Click **OK**



Warning

Are you sure you want to move all students with a leaving date on or before 27 JUN 2016 into the former roll?

- Click **Yes**

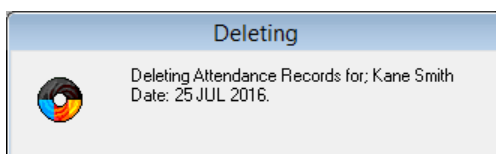


Current to Former Roll

Do you want to remove these students from their groups?

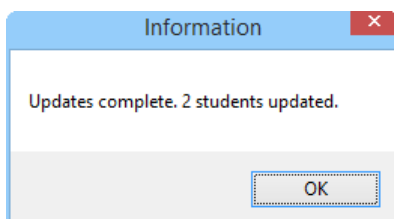
- Click **Yes**

**Note:** If Daily Records have been created for the day in question, a message will be displayed showing that Attendance Records are being deleted



Deleting

Deleting Attendance Records for: Kane Smith  
Date: 25 JUL 2016.

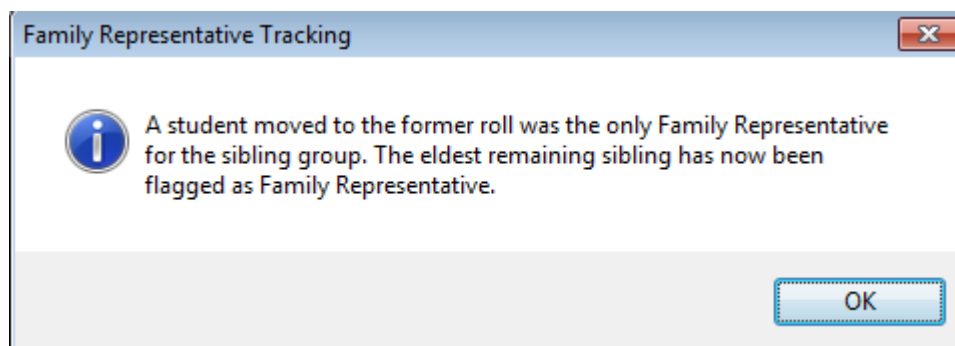


Information

Updates complete. 2 students updated.

- Click **OK**

**Note:** If one of the students being moved to the Former Roll was the Family Representative, the following message will display.



- Click **OK**

## 4.1 Step 2: Print Form Check 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 student's 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 2016 and Year 12 in secondary schools), as well as any other students who will be leaving.

## Activity:

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

- Enter **Proposed Year and Form** as the Title
- Directions to staff may be added in the Footer

The screenshot shows the 'Reports' window with the 'Standard Student Check List' report selected. The 'Layout' tab is active, showing a preview of the report header and footer. The title is 'Proposed Year and Form' and the footer is empty. The 'Options' section on the right has 'Small Font Report' and 'Preferred Name' selected.

Layout	Sort	Select	Includes
<p>West Coast District High School Proposed Year and Form</p> <p>*****</p> <p>*****</p>			
<p>Title: Proposed Year and Form</p> <p>Footer:</p>			

Options:


- ☒ Small Font Report
- ☐ Large Font Report
- ☒ Preferred Name
- ☐ Legal Name

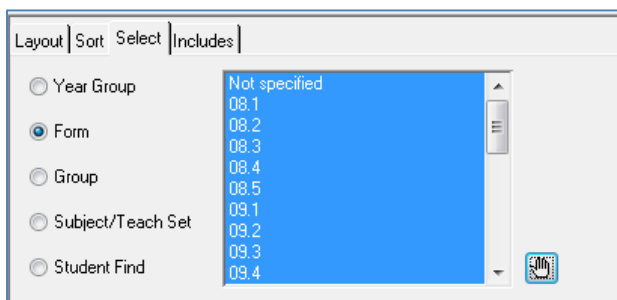
Buttons: Print, Cancel

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

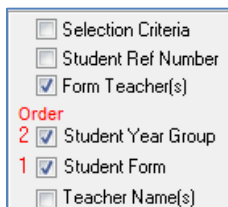
The screenshot shows the 'Reports' window with the 'Standard Student Check List' report selected. The 'Sort' tab is active, showing a list of fields to sort by. The 'Form' field is selected, and the 'Year' field is also selected. The 'Total' and 'Page' checkboxes are checked for the 'Form' field.

Layout	Sort	Select	Includes															
<p>Surname</p> <p>First Name</p> <p>Sex</p> <p>DOB</p> <p>House</p>																		
<table border="1"> <thead> <tr> <th></th> <th>Sort Field</th> <th></th> <th>Total</th> <th>Page</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Form</td> <td>▲</td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>2</td> <td>Year</td> <td>▲</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>					Sort Field		Total	Page	1	Form	▲	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2	Year	▲	<input type="checkbox"/>	<input type="checkbox"/>
	Sort Field		Total	Page														
1	Form	▲	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>														
2	Year	▲	<input type="checkbox"/>	<input type="checkbox"/>														

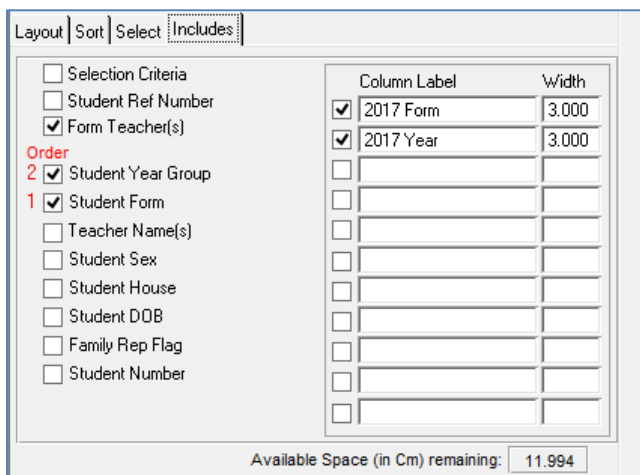
- Click the **Select** tab and choose **Form** option
- Click  **Select All** to highlight all forms



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



- Tick the first two columns and enter the column labels: **2017 Form** and **2017 Year**
- Enter the columns widths of **3 cm**




Column Label	Width
<input checked="" type="checkbox"/> 2017 Form	3.000
<input checked="" type="checkbox"/> 2017 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: 11.994

- Print** to the screen then close the report

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.

- Click on the blue folder 
- Enter a name for the custom report

Report Title

Please enter a title for the report

Proposed Year and Form

Cancel


OK

- Click **OK**
- Print the report to the screen

A portion of the report is displayed below

West Coast District High School

Proposed Year and Form



Form Teacher(s): 07.1 Ms E Everage

Name	Form	Year	2017 Form	2017 Year
Alkitik, Maria	07.1	7		
Amber, Kylie	07.1	7		
Andrews, Guy	07.1	7		
Arrowsmith, David	07.1	7		
Arrowsmith, William	07.1	7		
Atkins, Aaron	07.1	7		
Bandy, Brandy	07.1	7		
Baverstock, Helen	07.1	7		
Black, Mary	07.1	7		
Brown, Lana	07.1	7		
Cooper, Marianne	07.1	7		
Davids, Chelsea	07.1	7		
Dudney, Jenna	07.1	7		

**Note: Report can be accessed for later use via: WA Reports > Reports > Custom Reports**

## 5 Check the Intake and Leaver's Years

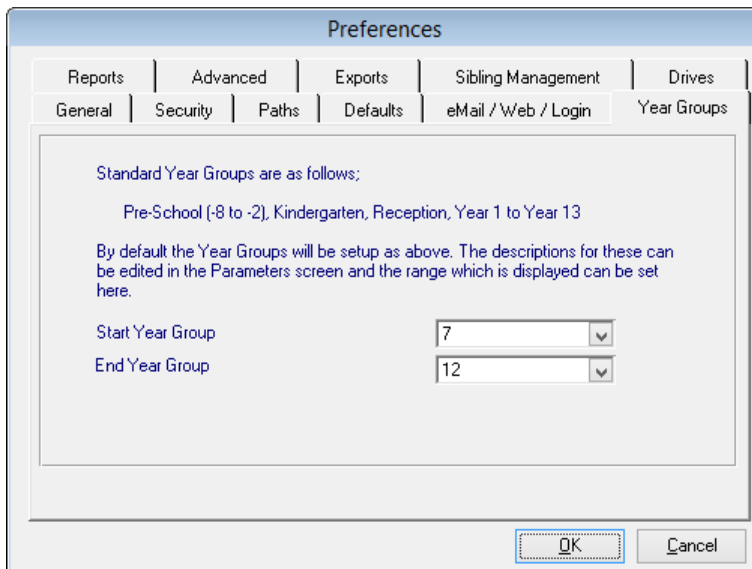
Schools will need to check the **Start Year Group** and **End Year Group** are correct in General > Control > Preferences > Year Groups. It is advisable to do this prior to commencing the Year End Process. The **Intake Year** and **Leaver's Year** must also be checked in General > School Details

### 5.1 Step 3: Year Groups

#### Activity: Check the Start Year Group and End Year Group

##### General > Control > Preferences > Year Groups

Secondary schools should check the Start Year Group is correctly set up to start with Year 7 (as shown below). Primary Schools should check that End Year Group is Year 6.



The screenshot shows a 'Preferences' window with the 'Year Groups' tab selected. The window has a title bar 'Preferences' and a tabbed interface with the following tabs: Reports, Advanced, Exports, Sibling Management, Drives, General, Security, Paths, Defaults, eMail / Web / Login, and Year Groups. The 'Year Groups' tab is active, displaying the following text: 'Standard Year Groups are as follows; Pre-School (-8 to -2), Kindergarten, Reception, Year 1 to Year 13. By default the Year Groups will be setup as above. The descriptions for these can be edited in the Parameters screen and the range which is displayed can be set here.' Below this text, there are two dropdown menus: 'Start Year Group' set to '7' and 'End Year Group' set to '12'. At the bottom right of the window are 'OK' and 'Cancel' buttons.

Click Cancel as we will not be making any changes to Year Groups in Training

## 5.2 Step 4: Check Intake and Leaver's Year

### Activity:

#### General > School Details

Secondary schools should check the intake year is correctly set up to start with Year 7. Primary Schools should check that the Leavers Year is Year 6.

Intake Year	K	Intake Year	7
Leavers Year	6	Leavers Year	12
Max Intake	0	Max Intake	0
Number on Roll	525	Number on Roll	525
Kindergarten	<input checked="" type="checkbox"/>	Kindergarten	<input checked="" type="checkbox"/>
Default FTE	1.00	Default FTE	1.00

In a District High School, the intake year will start with Year group K

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: 12  
Max Intake: 0  
Number on Roll: 525  
Kindergarten: ☒  
Default FTE: 1.00

**Note: If the Intake or Leaver's Year is incorrect, it must be edited in School Details.**

## 6 Step 5: Back up the Datafile

It is necessary to make a copy of the datafile 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 datafile and storing it in a folder where it is accessible if needed.

The SIS Backup Wizard or 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 SIS Backup Wizard. Instructions for using the SIS Backup Wizard can be found in the **K:\Inst\SIS Backup Wizard** folder.

Safe Backup and Single User Lock documentation can be found on the STIMS website

<http://det.wa.edu.au/intranet/stims/detcms/intranet/student-information-management-system/sis-administration/administrator-manager-module/general/general-fact-sheets.en?oid=MultiPartArticle-id-10935290>

### **IMPORTANT:**

*You will be asked to repeat this backup prior to processing Year End (Step 13) because of changes you have made to the datafile between now and then.*

## 7 Step 6: Set up the School Calendar for the New Year

It is critical when setting up the School Diary in SIS for 2017 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:

<http://www.det.wa.edu.au/education/termdates/holidays.html>

### 7.1 Term Dates and Public Holidays For 2017

**Notes: These dates are accurate as of 27<sup>th</sup> June 2016. Please check with DoE and your school Administration Team for confirmation of School Development Days and student start dates.**

**When establishing the Terms in the SIS School Diary, ALL Terms MUST begin on a Monday and the days where students are not required to attend should be marked as either Public Holidays or School Development Days as appropriate.**

Term 1, 2017	
Monday 30 January – Friday 7 April	
Students Return	Wednesday 1 February
School Development Days	2 Days before students return
Term 2, 2017	
Monday 24 April – Friday 30 June	
Students Return	Monday 24 April
School Development Days	Dates determined by the school
Term 3, 2017	
Monday 17 July – Friday 22 September	
Students Return	Monday 17 July
School Development Days	Dates determined by the school
Term 4, 2017	
Monday 9 October – Thursday 14 December	
Students Return	Monday 9 October
Students Finish	Thursday 14 December
School Development Days	Dates determined by the school

The Public Holidays for 2017 are:

PUBLIC HOLIDAY	DATE
New Year's Day	Sunday 1 January
Australia Day	Thursday 26 January
Labour Day	Monday 6 March
Good Friday	Friday 14 April
Easter Monday	Monday 17 April
ANZAC Day	Tuesday 25 April
WA Day	Monday 5 June
Queen's Birthday	Monday 25 September
Christmas Day	Monday 25 December
Christmas Day Observed	Monday 25 December
Boxing Day	Tuesday 26 December
Boxing Day Observed	Tuesday 26 December

***Notes: 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.***



## 7.2 Set up the School Calendar for the New Year

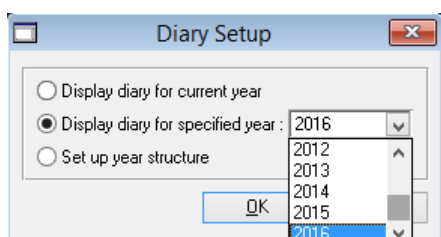
### Activity:

General > School Details

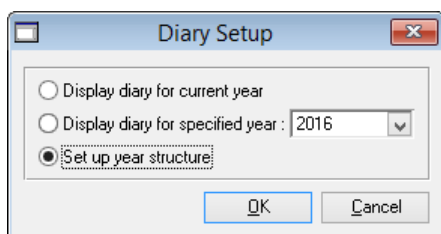
#### IMPORTANT

*Always make a copy of your data file prior to setting up a new year, in case you accidentally overwrite data.*

- Click Display School Diary 
- Click on Set up School Year 
- Click **Display Diary for Specified Year** to double check that the following year has not already been set up

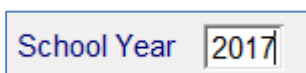


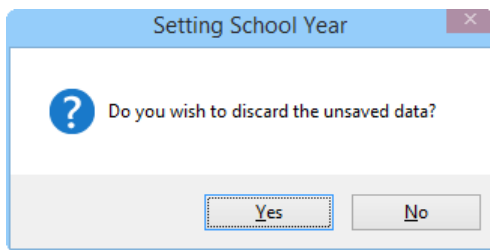
- Select **Set up year structure** and click **OK**



The School Year window will be displayed, showing this year's terms.

- Enter the Year in the School Year field
- **<Tab>** out





- Click **Yes**

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

- Overtyping the **I Inset Code** to read **S School Development**



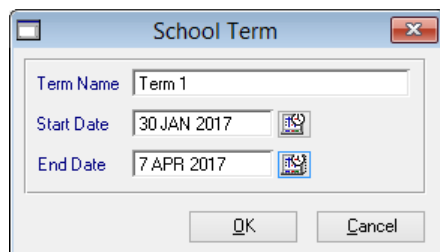
The new term dates can now be entered.

### **IMPORTANT**


**The Start Dates for each term are always set to the Monday of the first week of school regardless of which day the students start attending. Starting a term on any day other than a Monday has implications for Lesson Attendance and Timetabling. Any days that the students do not attend can be marked using the Closed code.**

- Click Add Term 

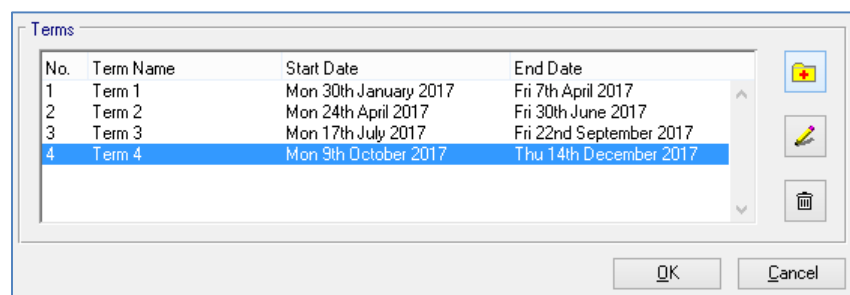
Enter the following:



A dialog box titled "School Term" with a close button (X) in the top right corner. It contains three input fields: "Term Name" with the text "Term 1", "Start Date" with the date "30 JAN 2017", and "End Date" with the date "7 APR 2017". Each date field has a small calendar icon to its right. At the bottom of the dialog are two buttons: "OK" and "Cancel".

- Click **OK**
- Repeat to add the remaining terms for the year
- Click Add Term 

Term 2	Mon 24 April – Fri 30 June
Term 3	Mon 17 July – Fri 22 Sept
Term 4	Mon 9 Oct – Thurs 14 Dec



A dialog box titled "Terms" with a list of terms. The list has four columns: "No.", "Term Name", "Start Date", and "End Date". The data is as follows:

No.	Term Name	Start Date	End Date
1	Term 1	Mon 30th January 2017	Fri 7th April 2017
2	Term 2	Mon 24th April 2017	Fri 30th June 2017
3	Term 3	Mon 17th July 2017	Fri 22nd September 2017
4	Term 4	Mon 9th October 2017	Thu 14th December 2017

On the right side of the list are three icons: a folder with a plus sign (Add), a pencil (Edit), and a trash can (Delete). At the bottom of the dialog are two buttons: "OK" and "Cancel".


**Note: 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.**

- Click  and close the School Year window

**Important: Terms are always entered as starting on a Monday. If the school is not open on the Monday, it may be entered as a closed day in the School Diary.**

## 7.3 Add School Development Days and Public Holidays

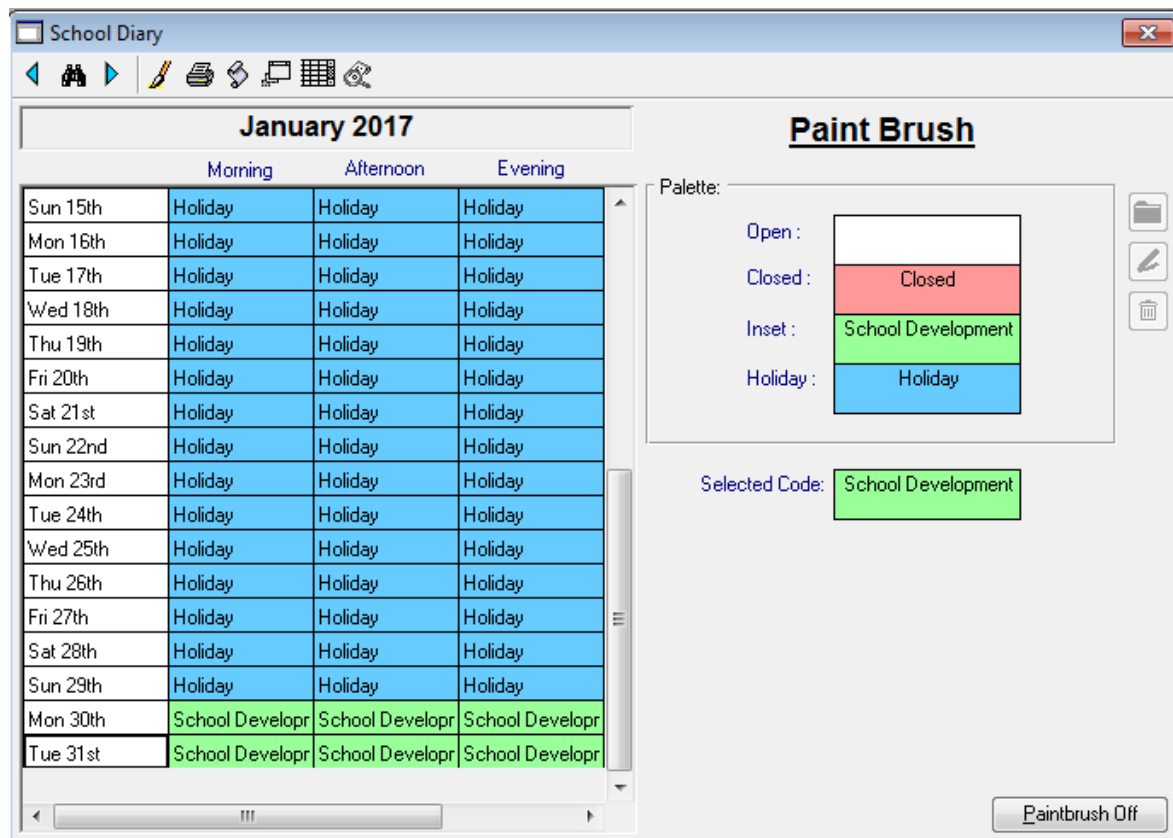
### Activity:

- In the School Diary window click on Toggle Paintbrush 

Click in the green **School Development** cell

Scroll down to the 30<sup>th</sup> January

Enter **Mon 30<sup>th</sup> Jan** and **Tues 31<sup>st</sup> Jan** as **School Development** days



The screenshot shows the 'School Diary' application window. The main calendar displays January 2017 with columns for Morning, Afternoon, and Evening. The dates from Sun 15th to Tue 31st are listed. The cells for Mon 30th and Tue 31st are highlighted in green and labeled 'School Development'. To the right, the 'Paint Brush' palette is open, showing a color selection interface. The palette includes a 'Selected Code' field set to 'School Development' and a 'Paintbrush Off' button.

	Morning	Afternoon	Evening
Sun 15th	Holiday	Holiday	Holiday
Mon 16th	Holiday	Holiday	Holiday
Tue 17th	Holiday	Holiday	Holiday
Wed 18th	Holiday	Holiday	Holiday
Thu 19th	Holiday	Holiday	Holiday
Fri 20th	Holiday	Holiday	Holiday
Sat 21st	Holiday	Holiday	Holiday
Sun 22nd	Holiday	Holiday	Holiday
Mon 23rd	Holiday	Holiday	Holiday
Tue 24th	Holiday	Holiday	Holiday
Wed 25th	Holiday	Holiday	Holiday
Thu 26th	Holiday	Holiday	Holiday
Fri 27th	Holiday	Holiday	Holiday
Sat 28th	Holiday	Holiday	Holiday
Sun 29th	Holiday	Holiday	Holiday
Mon 30th	School Developr	School Developr	School Developr
Tue 31st	School Developr	School Developr	School Developr

Paint Brush palette:

- Open : [White box]
- Closed : [Red box labeled Closed]
- Inset : [Green box labeled School Development]
- Holiday : [Blue box labeled Holiday]

Selected Code: [Green box labeled School Development]

Paintbrush Off

**Hint: Click on the actual date. This will highlight all 3 cells. To correct an error, click in the white cell, click on the error and reselect the correct colour code**

- Click in the blue **Holiday** cell
- Use the blue chevrons  to navigate to **March**  
Enter **Mon 6th** as a public holiday


**School Diary**

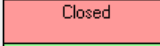
March 2017

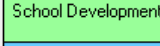
1st March 2017

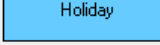
	Morning	Afternoon	Evening
Wed 1st			
Thu 2nd			
Fri 3rd			
Sat 4th	Closed	Closed	Closed
Sun 5th	Closed	Closed	Closed
Mon 6th	Holiday	Holiday	Holiday
Tue 7th			
Wed 8th			
Thu 9th			
Fri 10th			
Sat 11th	Closed	Closed	Closed
Sun 12th	Closed	Closed	Closed
Mon 13th			
Tue 14th			
Wed 15th			
Thu 16th			
Fri 17th			
Sat 18th	Closed	Closed	Closed


Palette:

Open : 

Closed : 

Inset : 

Holiday : 

Selected Code: 

Paintbrush Off

Navigate to April  
Enter **Tuesday 25<sup>th</sup> April** as a public holiday

**School Diary**

**April 2017**

	Morning	Afternoon	Evening
Fri 14th	Holiday	Holiday	Holiday
Sat 15th	Holiday	Holiday	Holiday
Sun 16th	Holiday	Holiday	Holiday
Mon 17th	Holiday	Holiday	Holiday
Tue 18th	Holiday	Holiday	Holiday
Wed 19th	Holiday	Holiday	Holiday
Thu 20th	Holiday	Holiday	Holiday
Fri 21st	Holiday	Holiday	Holiday
Sat 22nd	Holiday	Holiday	Holiday
Sun 23rd	Holiday	Holiday	Holiday
Mon 24th			
Tue 25th	Holiday	Holiday	Holiday
Wed 26th			
Thu 27th			
Fri 28th			
Sat 29th	Closed	Closed	Closed
Sun 30th	Closed	Closed	Closed

**1st April 2017**

Palette:

- Open :
- Closed : Closed
- Inset : School Development
- Holiday : Holiday

Selected Code: Holiday

Paintbrush Off

Navigate to **June**  
Enter **Monday 5<sup>th</sup> June** as a public holiday

**School Diary**

**June 2017**

	Morning	Afternoon	Evening
Thu 1st			
Fri 2nd			
Sat 3rd	Closed	Closed	Closed
Sun 4th	Closed	Closed	Closed
Mon 5th	Holiday	Holiday	Holiday
Tue 6th			
Wed 7th			
Thu 8th			
Fri 9th			
Sat 10th	Closed	Closed	Closed
Sun 11th	Closed	Closed	Closed
Mon 12th			
Tue 13th			
Wed 14th			
Thu 15th			
Fri 16th			
Sat 17th	Closed	Closed	Closed
Sun 18th	Closed	Closed	Closed

**1st June 2017**

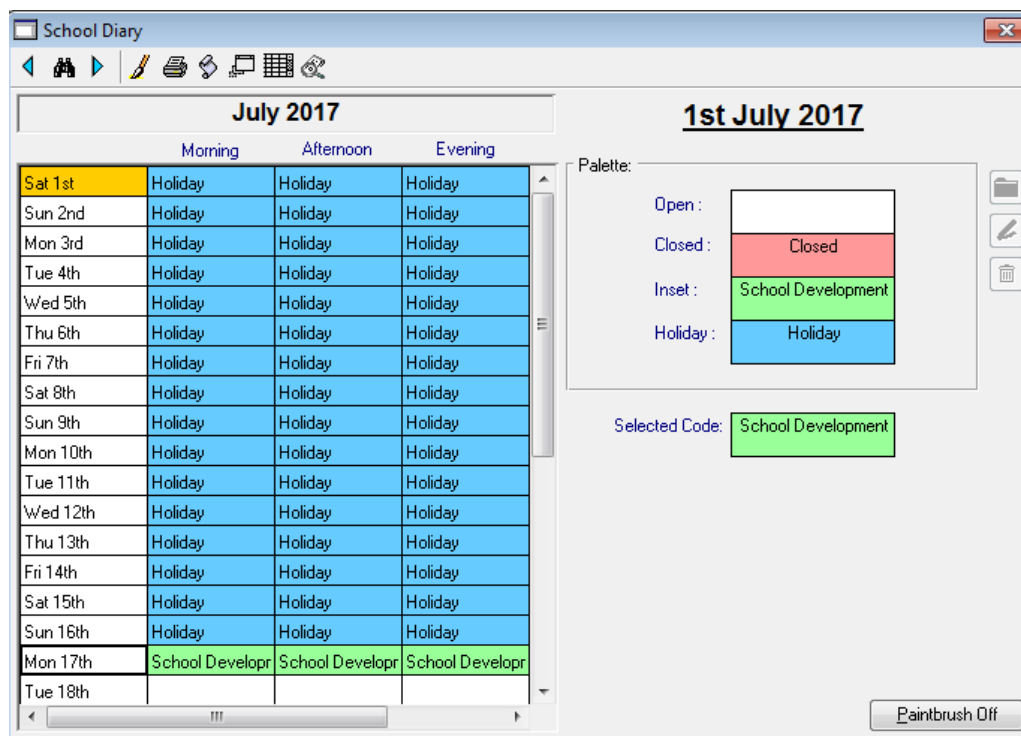
Palette:

- Open :
- Closed : Closed
- Inset : School Development
- Holiday : Holiday

Selected Code: Holiday

Paintbrush Off

Navigate to July  
 Change the Paintbrush Code to School Development  
 Mark **17<sup>th</sup> July** as a School Development Day



Turn the paintbrush off  and Close


**Note: These dates were correct at the time of printing. Please refer to [CIVICA](http://www.det.wa.edu.au/education/termdates/to confirm dates prior to input.</a></b></p>
</div>
<div data-bbox=)**


## 8 Step 7: 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  icon will create semester dates.


Selecting the  icon will create term dates.

Selecting  will allow users to create customised Timetabling Periods. Schools using Timetabling will create the Timetabling Periods they require. Schools not using Timetabling will use the semester Timetabling Periods to enable the reporting of half day absences in Formal Reports.

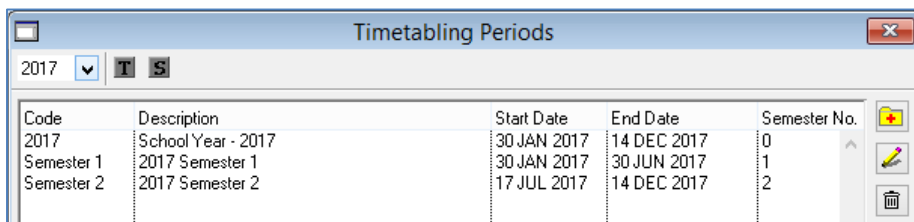
### ACTIVITY:

#### General > School Details

#### Define Semesters 1 and 2

Click on Timetabling periods   
Ensure **2017** is selected

Click on **Create Semesters from School Diary**  to create semester periods



Code	Description	Start Date	End Date	Semester No.
2017	School Year - 2017	30 JAN 2017	14 DEC 2017	0
Semester 1	2017 Semester 1	30 JAN 2017	30 JUN 2017	1
Semester 2	2017 Semester 2	17 JUL 2017	14 DEC 2017	2

### IMPORTANT

**All dates MUST start on a Monday. If any start date is NOT a Monday, please call the Customer Service Centre on 926 4555 (Metro Schools) or 1800 012 828 (Regional Schools)**

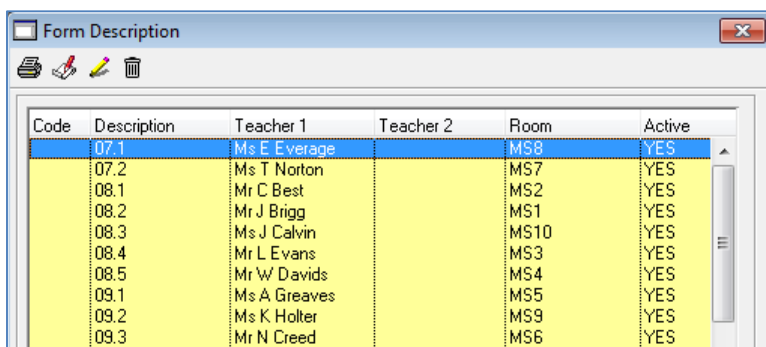
## 9 Step 8: Set up Form Descriptions for the New Year

If additional Form Classes need to be set up for the following year, these need to be created before students can be allocated to them.

**IMPORTANT: Do not allocate teachers at this time**

### Activity:

#### General > Parameters > Form Description



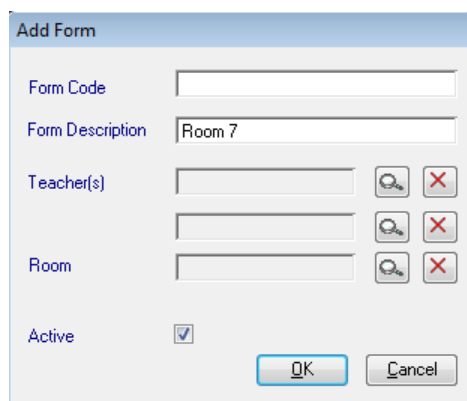
Code	Description	Teacher 1	Teacher 2	Room	Active
07.1		Ms E Everage		MS8	YES
07.2		Ms T Norton		MS7	YES
08.1		Mr C Best		MS2	YES
08.2		Mr J Brigg		MS1	YES
08.3		Ms J Calvin		MS10	YES
08.4		Mr L Evans		MS3	YES
08.5		Mr W Davids		MS4	YES
09.1		Ms A Greaves		MS5	YES
09.2		Ms K Holter		MS9	YES
09.3		Mr N Creed		MS6	YES

**Note: Do not edit or delete the Not Specified parameter. If there is no Not Specified parameter in the list, contact your Customer Service Centre (92645555 for metropolitan schools and 1800 012 828 for country schools) before proceeding.**

Click Add



Enter the **Form Description: Room 7** (skip the first field **Form Code**)



**Add Form**

Form Code:

Form Description:

Teacher(s):

Room:

Active: ☒

Click **OK** and **Close**

## 10 Step 9: Speed Edit Leaver's Details

### IMPORTANT

*The processing of leavers is a 2 part function. The first part (Step 9) is where the Leavers' dates and destinations are entered; the second step (Step 10) is where the Leavers are allocated a proposed year and form and then moved to the former roll as part of the End of Year process.*

Use **Speed Edit** to enter a **Leave Date** and **Destination** for your top year group for 2016, and for all students who will not remain at the school. This includes 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.**

To ensure that both the Destination and Leave Date are saved correctly in Speed Edit, enter the Destination first, followed by the Leave Date, saving each separately as you go.


If the destination is unknown, use the value **Not Specified** or **Other Sources**. If the destination is known but is not in the list, contact the Customer Service Centre on 9264 5555 (metro schools) and 1800 012 828 (regional schools)

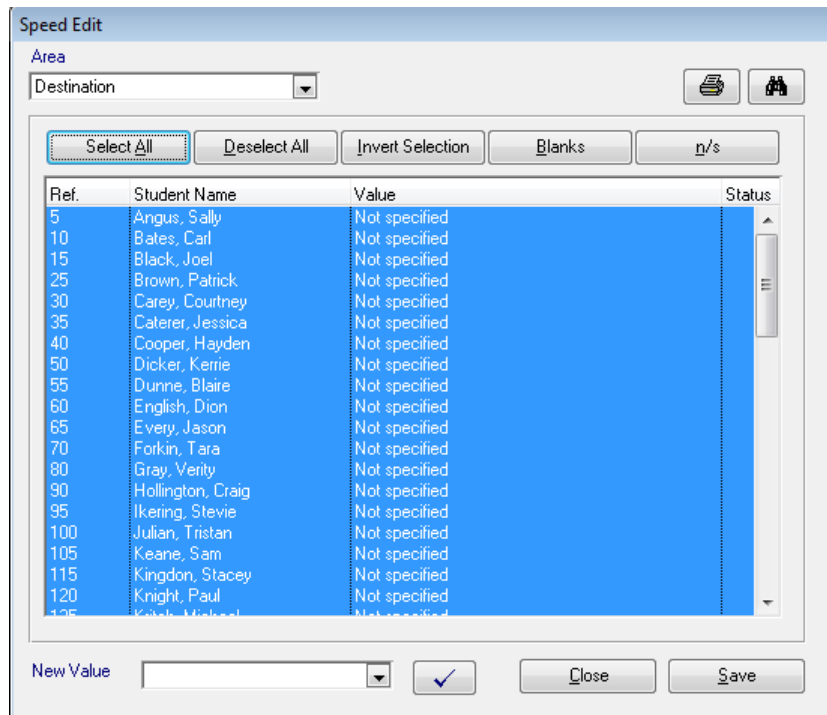
### IMPORTANT

*Do not use speed edit to set up proposed years or forms, as this will prevent the Year End Process functioning correctly.*

## Activity:

### Admin > Speed Edit

- Find  the students in **Year 12**
- Change **Area** to **Destination**
- Click **Select All**

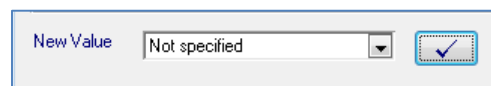


The Speed Edit dialog box shows the 'Area' dropdown set to 'Destination'. The 'Select All' button is highlighted. Below the buttons is a table with student data.

Ref.	Student Name	Value	Status
5	Angus, Sally	Not specified	
10	Bates, Carl	Not specified	
15	Black, Joel	Not specified	
25	Brown, Patrick	Not specified	
30	Carey, Courtney	Not specified	
35	Caterer, Jessica	Not specified	
40	Cooper, Hayden	Not specified	
50	Dicker, Kerrie	Not specified	
55	Dunne, Blaire	Not specified	
60	English, Dion	Not specified	
65	Every, Jason	Not specified	
70	Forkin, Tara	Not specified	
80	Gray, Verity	Not specified	
90	Hollington, Craig	Not specified	
95	Ikering, Stevie	Not specified	
100	Julian, Tristan	Not specified	
105	Keane, Sam	Not specified	
115	Kingdon, Stacey	Not specified	
120	Knight, Paul	Not specified	
125	Kitch, Michael	Not specified	

At the bottom, the 'New Value' dropdown is set to 'Not specified', and the 'Apply' button (checkmark icon) is highlighted.

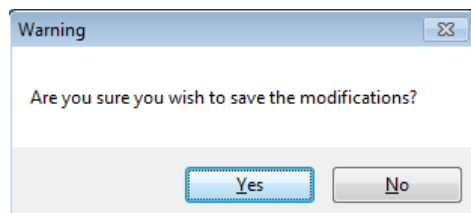
- Select the **New Value** of **Not Specified**



The 'New Value' dropdown menu is shown with 'Not specified' selected. The 'Apply' button (checkmark icon) is highlighted.

- Click Apply Changes 

- Click 



A 'Warning' dialog box with the text 'Are you sure you wish to save the modifications?'. It has 'Yes' and 'No' buttons. The 'Yes' button is highlighted.

- Click **Yes**

- Select **Leave Date** from the **Area** drop down menu
- Click **Select All**
- Enter the New Value as **4 Nov 2016**

New Value

**Note: Each school will determine the appropriate Leave Date for their Year 12 students.**

- Click Apply Changes



**Speed Edit**

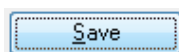
Area  
Leave Date

Select All Deselect All Invert Selection Blanks n/s

Ref.	Student Name	Value	Status
280	Piper, Michelle	4 NOV 2016	M
285	Price, Charlie	4 NOV 2016	M
290	Pryor, Cassie	4 NOV 2016	M
295	Ramsay, Damien	4 NOV 2016	M
300	Redcliffe, Carina	4 NOV 2016	M
310	Roediger, Craig	4 NOV 2016	M
320	Russo, Tanya	4 NOV 2016	M
330	Schluter, Lucy	4 NOV 2016	M
335	Schonberg, Luke	4 NOV 2016	M
340	Shaw, Dwayne	4 NOV 2016	M
345	Simpson, Colin	4 NOV 2016	M
355	Smothered, Keith	4 NOV 2016	M
360	Soulis, Kate	4 NOV 2016	M
365	Stickman, Leah	4 NOV 2016	M
370	Sullivan, Elaine	4 NOV 2016	M
375	Thomas, Alex	4 NOV 2016	M
380	Vance, Anthony	4 NOV 2016	M
390	Williams, Katie	4 NOV 2016	M
395	Zanadu, Paul	4 NOV 2016	M

New Value

- Click



**Warning**

Are you sure you wish to save the modifications?

- Click **Yes**

**Note: Not Specified is only used for Year 12 leavers. All other leavers including Year 6's going to High School and Year 10's moving from District High Schools to Senior High Schools or Colleges must have their destination school entered.**

## 11 Step 10: Increment Student's Proposed Years/Forms



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

### IMPORTANT

***Do not use speed edit to set up proposed years or forms, as this will prevent the Year End Process functioning correctly***

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.

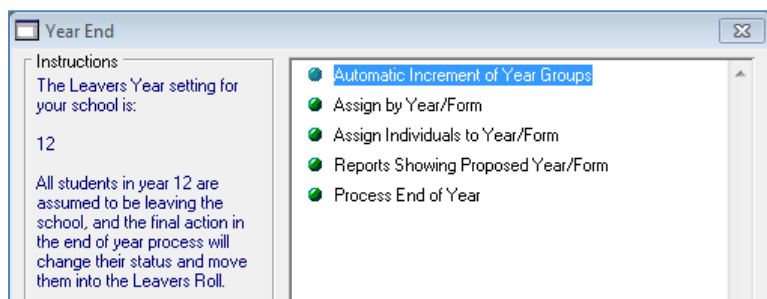
These functions are available through the Year End on the Admin sidebar.

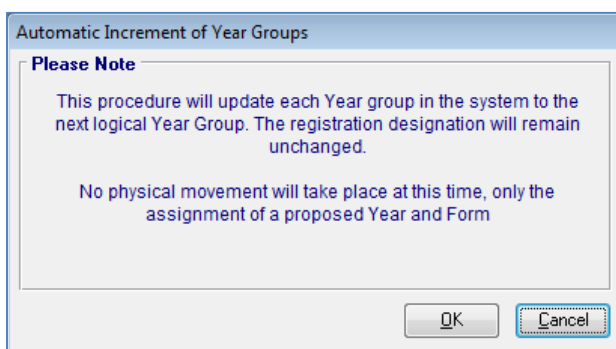
***Note: Option 3 is recommended for most primary schools. Option 2 is recommended for secondary schools where the student groups remain the same from one year to the next. Option 3 must be used for students leaving the school who are not in the Leavers' Year.***

### 11.1 Automatic Increment of Year Groups

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)

- Select **Year End** in the **Admin** sidebar.
- Click on the **Automatic Increment of Year Groups**.





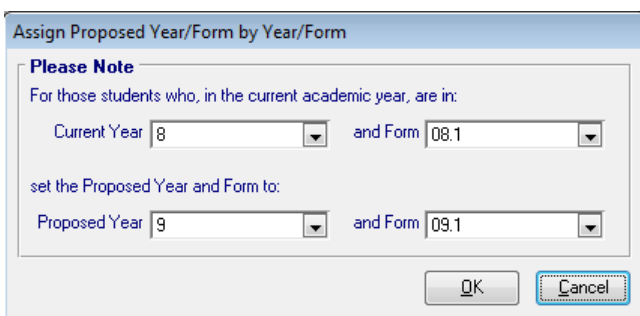
- Click **OK** to proceed.

**Note: Registration designation signifies Form.**

## 11.2 Assign by Year/Form

If students' Years and Forms change such that they are both incremented by one (for example, Year 8, Form 8.1 becomes Year 9, Form 9.1), choose the second option from the Year End menu - **Assign by Year/Form**.

- Select **Year End** in the **Admin** sidebar.
- Click on the **Assign by Year/Form**.



- Enter the **Current Year** and **Form** and **Proposed Year** and **Form**.
- Click **OK**

**Note: Do not use this function to process Leavers. For Leavers follow the process shown below in Section 11.3.**

## 11.3 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.

- Click on **Assign Individuals to a Year/Form**.
- Select the **Current Year/Form** to display the current student's 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**.
- Click **Update Line(s)**.

**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 the student's names in the list. To flag the Leavers, select Leaver in Proposed Year Group and Not Specified in Proposed Form.**

Name	Proposed Year/Form
Anderson, Kurt	4/Room 4
Avery, Charmaine	4/Room 4
Connell, Melissa	4/Room 4
De Mamiel, Zola	4/Room 4
Em, Brenton	4/Room 4
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

Click **Save Modifications**.

Check that you have allocated a proposed year and form to each student in the form.

Repeat for each form.

Save the modifications and close the window when you have allocated all students.

For students in the Leavers year, allocate a **Proposed Year Group** of **Leaver** and **Proposed Form** of **Not Specified**.

**Note: Remember to allocate Leaver and Not Specified to any student that has indicated they will not be returning in 2017.**

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

### 11.3.1 Increment Students' Proposed Years and Proposed Forms

#### Activity:

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

We will use **Assign Individuals to Year/Form** function to allocate Years 4, 5, 6, 7 and Form 12.1 to proposed years and forms.

**Some** of the Year 4 students are going into Room 5 and **some** are going into Room 6

Select the **Current Year/Form: 4/Room 4**

Choose the **Proposed Year Group – 5** and **Proposed Form – Room 5**

Name	Proposed Year/Form
Albert, Jackie	Not specified/Not specified
Bailie, Doyen	Not specified/Not specified
Dunstan, Jennifer	Not specified/Not specified
Edwards, Julie	Not specified/Not specified
Farmer, Kristof	Not specified/Not specified
Gray, Thireth	Not specified/Not specified
Jones, Tim	Not specified/Not specified
Marshall, Kristy	Not specified/Not specified
Moor, Chris	Not specified/Not specified
North, Mathew	Not specified/Not specified
Price, Tiffani	Not specified/Not specified
Sorrell, Sarah	Not specified/Not specified

Select the students from **Albert, Jackie** to **North, Matthew**

Click **Update Lines**

Click **Invert Selection**

Change the **Room** to **Room 6**

**End of Year Individual Assignment**

Year/Form Select  
Current Year/Form: 4/Room 4

Modifications  
Proposed Year Group: 5  
Proposed Form: Room 6  
Update Line(s)

Name	Proposed Year/Form
Albert, Jackie	5/Room 5
Baile, Doyen	5/Room 5
Dunstan, Jennifer	5/Room 5
Edwards, Julie	5/Room 5
Farmer, Kristof	5/Room 5
Gray, Thireth	5/Room 5
Jones, Tim	5/Room 5
Marshall, Kristy	5/Room 5
Moor, Chris	5/Room 5
North, Mathew	5/Room 5
Price, Tiffani	Not specified/Not specified
Sorrell, Sarah	Not specified/Not specified

Select All Invert Selection Save Modifications Close

Click **Update lines**

Click **Save Modifications**

Click **Yes and OK**

Repeat this activity to set the Proposed Year and Form for Years 5, 6, 7 and Form 12.1 using the following screenshots as a guide

### All of the Year 5 Students are going into Year 6 in Room 7

**End of Year Individual Assignment**

Year/Form Select  
Current Year/Form: 5/Room 5

Modifications  
Proposed Year Group: 6  
Proposed Form: Room 7  
Update Line(s)

Name	Proposed Year/Form
Brown, Steven	6/Room 7
Content, Damien	6/Room 7
Delamare, Graeme	6/Room 7
Desilva, Haley	6/Room 7
Edwardo, Jacob	6/Room 7
Edwards, Justin	6/Room 7
Elliott, Katherine	6/Room 7
Farmer, Kristy	6/Room 7
Fanton, Steven	6/Room 7
Gray, Terille	6/Room 7
Havlent, Tom	6/Room 7
Hushler, Elizabeth	6/Room 7

Select All Invert Selection Save Modifications Close

## All of the Year 6s are going into Year 7 in Form 7.1

**End of Year Individual Assignment**

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

Modifications  
Proposed Year Group: 7  
Proposed Form: 07.1  
[Update Line\(s\)](#)

Name	Proposed Year/Form
Baker, Reuben	7/07.1
Barbour, Ross	7/07.1
Born, Tanya	7/07.1
Chum, Nora	7/07.1
Ellard, Kate	7/07.1
Jones, Keith	7/07.1
Loxton, Katherine	7/07.1
Luck, Martin	7/07.1
Mills, Mark	7/07.1
Murphy, Tamara	7/07.1
Richards, Mason	7/07.1
Tep, Josh	7/07.1

[Select All](#) [Invert Selection](#) [Save Modifications](#)

[Close](#)

## All of the 7.1 students will go into Year 8 and Form 8.2

**End of Year Individual Assignment**

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

Modifications  
Proposed Year Group: 8  
Proposed Form: 08.2  
[Update Line\(s\)](#)

Name	Proposed Year/Form
Hardley, Todd James	8/08.2
James, Kendell	8/08.2
Koehler, Bronson	8/08.2
Lesley, Codie	8/08.2
Nichols, Tanya	8/08.2
Oliver, Nancy	8/08.2
Richardson, Ben	8/08.2
Sintar, Ellen	8/08.2
Smith, Thy	8/08.2
Taylor, Cass	8/08.2
Ward, Guy	8/08.2
Ward, Simon	8/08.2

[Select All](#) [Invert Selection](#) [Save Modifications](#)

[Close](#)

## All of the 7.2 students are going into Year 8 and Form 8.3

**End of Year Individual Assignment**

Year/Form Select  
Current Year/Form: 7/07.2

Modifications  
Proposed Year Group: 8  
Proposed Form: 08.3  
**Update Line(s)**

Name	Proposed Year/Form
Paterson, Erin	8/08.3
Pendlebury, Stacey	8/08.3
Peters, Daryl	8/08.3
Phelps, Ryan	8/08.3
Rafferty, Eleanor	8/08.3
Robson, Zoe	8/08.3
Sampson, Nora	8/08.3
Scanty, Janelle	8/08.3
Sintar, Karl	8/08.3
Sullivan, Hannah	8/08.3
Wansbrough, Brandon	8/08.3
Zilker, Susan	8/08.3

Select All Invert Selection Save Modifications  
Close

Click **Update Lines** and **Save Modifications**

## All students in 12/12.1 will be set to Leaver as the Year Group and Form - 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
Mentoring, Jess	Leaver/None
Moraru, Phillip	Leaver/None
Nixon, Tania	Leaver/None
O'Donnell, Sean	Leaver/None
Orringe, Nathan	Leaver/None
Peterson, Candice	Leaver/None
Pryor, Cassie	Leaver/None
Roediger, Craig	Leaver/None
Schonberg, Luke	Leaver/None
Smith, Kane	Leaver/None
Stickman, Leah	Leaver/None
Vance, Anthony	Leaver/None

Select All Invert Selection Save Modifications  
Close

Click **Update Lines** and **Save Modifications**  
Click **Yes** and **OK**  
Close the window

## Admin > Year End > Assign by Year/Form

We will use **Assign by Year/Form** to allocate proposed Years/Forms for the remainder of the students still to be processed.

Current Year	Current Form	Proposed Year	Proposed Form
8	8.1	9	9.1
8	8.2	9	9.2
8	8.3	9	9.3
8	8.4	9	9.4

**Assign Proposed Year/Form by Year/Form**

**Please Note**  
For those students who, in the current academic year, are in:

Current Year  and Form

set the Proposed Year and Form to:

Proposed Year  and Form

## 12 Step 11: Print Reports Showing Proposed Years and Proposed Forms

### Admin > Year End > Reports Showing Proposed Year/Form

These reports allow users to check the proposed Years and Forms prior to processing Year End. The Year End process will not proceed until all students have a proposed year group and form and the leave date and destination have been set for school leavers.

**Form Lists of Proposed Year/Form Groups** will generate form lists for the new school year. These will be complete, apart from the Admissions Roll students. **Do not use proposed Year and Proposed Form for students on the Admissions Roll.** Students on the Admissions Roll can also be included in reports by checking **Include Admissions Roll**. Admissions students are identified on such reports with an asterisk.

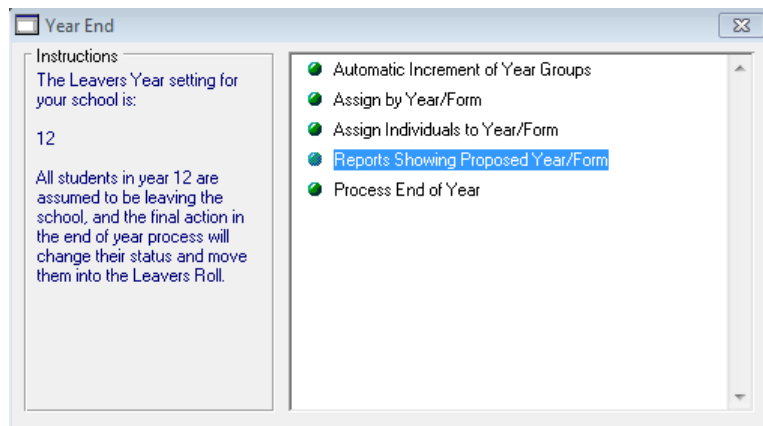
**Note: It is recommended that you print a list of students without a proposed Year or Form or without a Leave Date and Destination, the fourth option. The report lists students who have no proposed year and/or form. If any have been missed, return to Step 10 and make the necessary changes before the End of Year is processed.**

### IMPORTANT

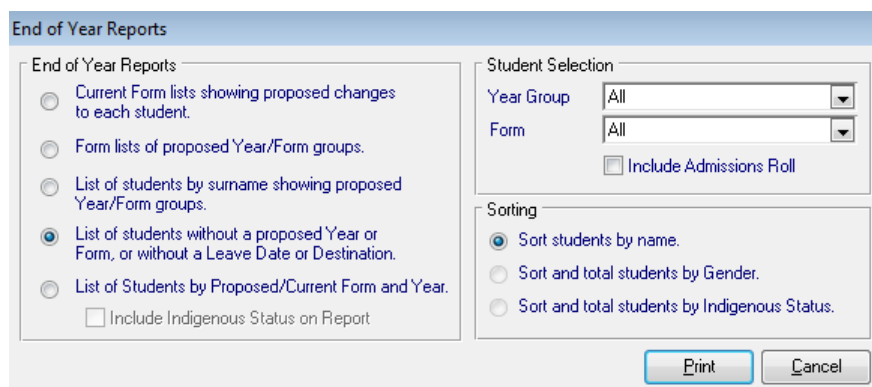
**Students entered onto the Admissions Roll should be allocated to the Year and Form they will go into in 2017.**

## Activity:

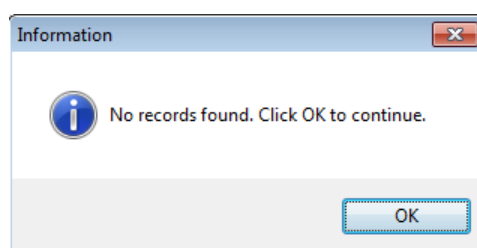
### Admin > Year End > Reports Showing Proposed Year/Form



- Select the End of Year Report **List of students without a proposed Year or Form or without a Leave Date or Destination**



- Click **Print**



- Click **OK**

**Note: If there are any students without a Proposed Year or Form or without a Leave Date or Destination, these will need to be allocated before the Year End Process can proceed**

## Activity:

### Admin > Year End > Reports Showing Proposed Year/Form

- Select the last option - **List of students by Proposed/Current Form and Year**

**End of Year Reports**

End of Year Reports

- ☐ Current Form lists showing proposed changes to each student.
- ☐ Form lists of proposed Year/Form groups.
- ☐ List of students by surname showing proposed Year/Form groups.
- ☐ List of students without a proposed Year or Form, or without a Leave Date or Destination.
- ☒ List of Students by Proposed/Current Form and Year.

☐ Include Indigenous Status on Report

Student Selection

Year Group: All

Form: All

☐ Include Admissions Roll

Sorting

- ☒ Sort students by name.
- ☐ Sort and total students by Gender.
- ☐ Sort and total students by Indigenous Status.

Print Cancel

- Click **Print** and **OK**

View the report and the students entered against their Proposed Year and Forms.

## 13 Step 12: Print Student Lists for Reference (Recommended)

The Department of Education recommends the printing of Year and Form Lists for the current year before running the Year End process for future reference as the system does not retain the previous year's data after Year End has been processed.

### Activity:

**Admin > Reports > Form Lists > Standard Form List**

The screenshot shows a window titled 'Reports' with a toolbar at the top. On the left is a tree view under 'Form Lists' with 'Standard Form List' selected. The right pane contains configuration options:

- Titles:** Main Title is 'Standard Form List', Page Footer is empty. ☒ Include Teacher Name(s) on Report.
- Sort Fields:** A list on the left includes DOB, Gender, Surname, and Year. To the right is a table with columns 'Sort Field', 'Total', and 'Page'.
- Options:** Form is set to 'All', Year Group is set to 'All'. ☒ Student Number, ☐ Tick Box, ☐ Show Family Representative totals, and ☐ Separate by Year Group.

At the bottom right are 'Print' and 'Cancel' buttons.

Click  and **OK**

**Note: This report will print all Current Form classes by default. Other Form or Year Lists can be printed from Admin > Reports > Roll Reports.**

## Admin > Reports > Roll Reports > Year List

Highlight all Year Groups

Reports

Titles

Main Title: Year Lists

Page Footer:

Sort

Sort Field	Total	Page
DOB		
Student Number		
Gender		

Select Year Group(s)

P
1
2
3
4

☒ Including Student Number  
☐ Excluding Student Number

Print Cancel

Click  and **OK**

## 14 Step 13: Process a Back up

Process a backup of the data file as described in Section 5

### **IMPORTANT**

***Before proceeding to the next step, repeat the backup.***

## 15 Step 14: Process Year End

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, that is, all users except the person performing the Year End process must be logged out of Integris and the Single User Lock activated.

***Note: Users should negotiate a suitable time to perform the End of Year Processes.***

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. Each school decides whether to process End of Year after the end of the academic year or immediately before commencement of the new academic year.

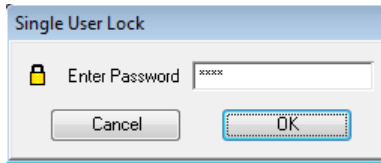
### **IMPORTANT**

***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 or 1800 012 828 for regional callers.***

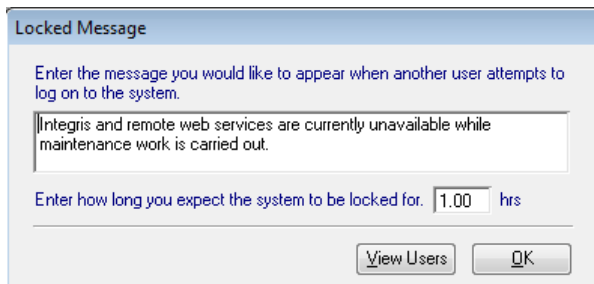
## Activity:


### File > Single User Lock

- Type your password ('**keys**' for today's training)



Click **OK**



Click  to ensure that no other users are logged on

- Click **Close** then **OK**

**Note:** There may be circumstances where users appear in the list but are adamant they have logged off correctly. In this case you may use the Gateway command to reset all user accounts. The instructions for this are on the next page.

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



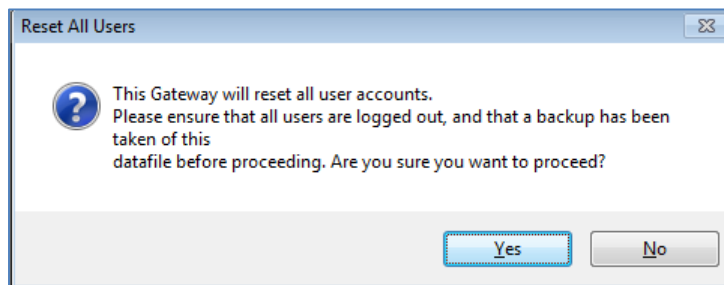
## Activity: Resetting All Users

In some circumstances it may be necessary to reset all users' access. You must be in Single User Lock to perform this Gateway command.

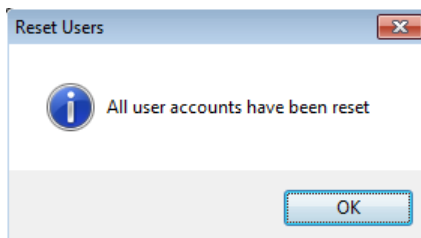
### File > Gateway



Enter the text **RESETALLUSERS** and press **<Enter>**



Click **Yes**



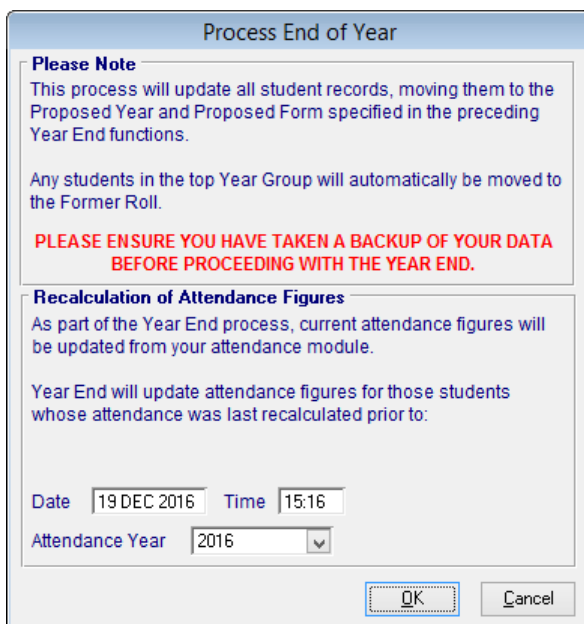
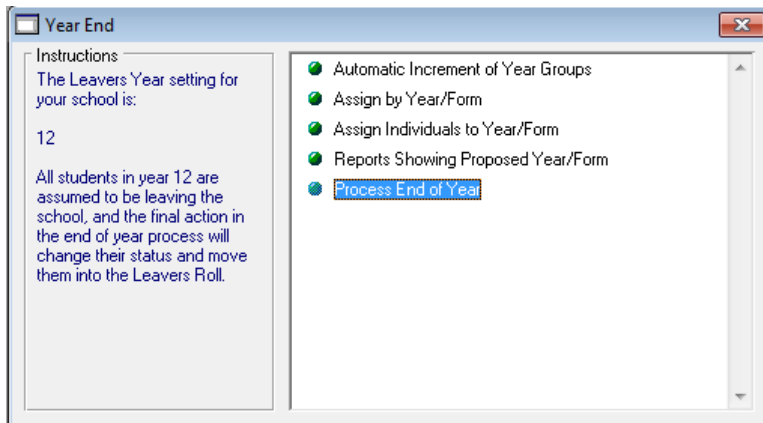
Click **OK**

## Activity: Process Year End

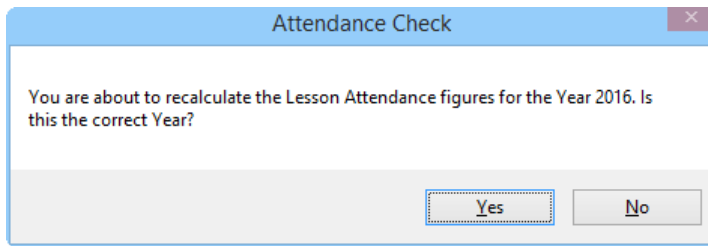
### Admin > Year End

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

Double Click on **Process End of Year**

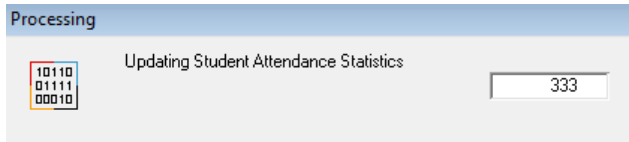
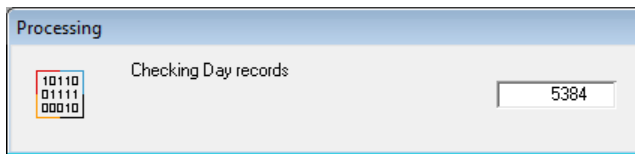


- Ensure the correct attendance year is selected
- Click **OK**

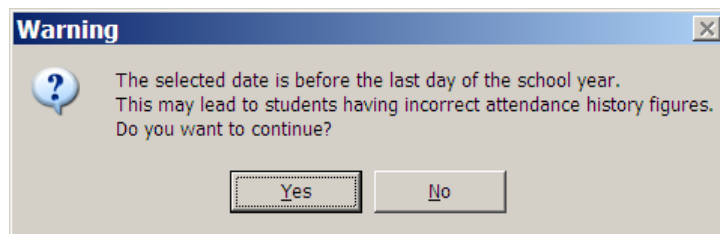


- Click **Yes**

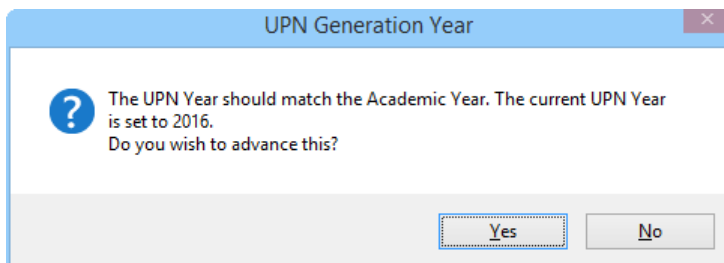
A number of messages will display while the system checks daily records and attendance data



**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.**

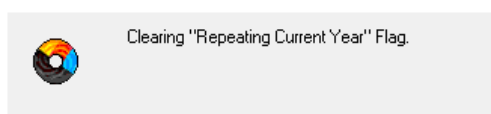
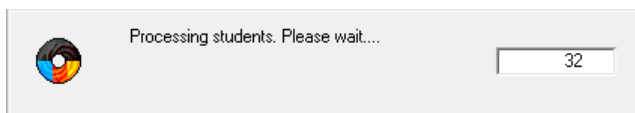


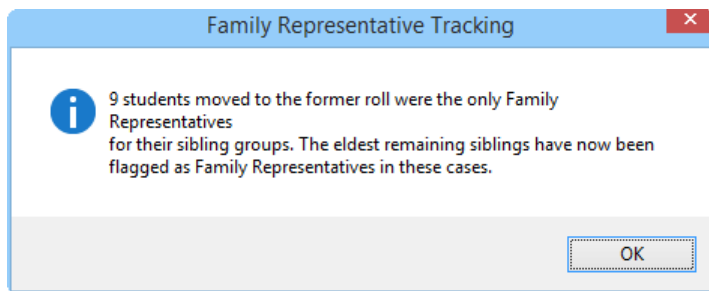
At the conclusion of this process the following message will be displayed:



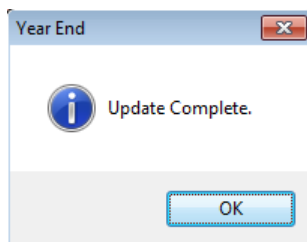
- Click **Yes**

**Note: If the current UPN year is NOT set to the current year in your message box, continue with the Year End Process and then contact the Customer Service Centre for assistance in changing the UPN year.**

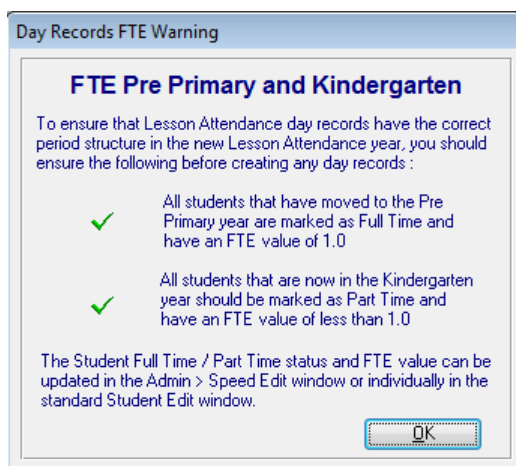




- Click **OK**



Click **OK**



Read the **Day Records FTE Warning**  
Click **OK**

**Note: The processing of Year End may take from 10 to 45 minutes depending on factors such as processor capacity, student numbers and whether or not the Lesson Attendance module is loaded.**

**Notes: Schools need to ensure that the FTE values for all Pre-Primary and Kindergarten students are correct before creating any Lesson Attendance Daily Records for the new year. See Checklist Step 18.**

## 16 Step 15: Check Year End was Successful

### Activity

#### General > Student Details

All students' should now have been incremented by one year. It is important to check that this has been successful.

- Check that **Jackie Albert** (the first student) is now in **Year 5/ Form Room 5**
- Check that **Adam Alkitik** (the second student) is now in **Year 10/ Form 10.1**

**Note: If Year End has not processed successfully, contact the Customer Service Centre.**

## 17 Step 16: Process Admissions Students

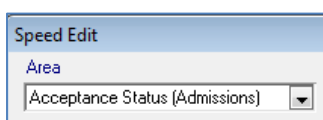
Entering Admissions students (e.g. incoming Kindy or Pre-Primary students in a primary school or incoming Year 7 students in a secondary school for 2017) may be done at any time, but accepting them to the current roll should be undertaken **after** processing Year End. The Department of Education WA recommends that schools admit Admissions students to the Current Roll when the students arrive at 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.

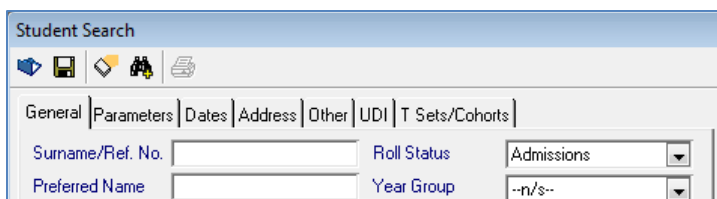
### Activity:

#### Admin > Speed Edit

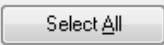
- Choose the **Area - Acceptance Status (Admissions)**

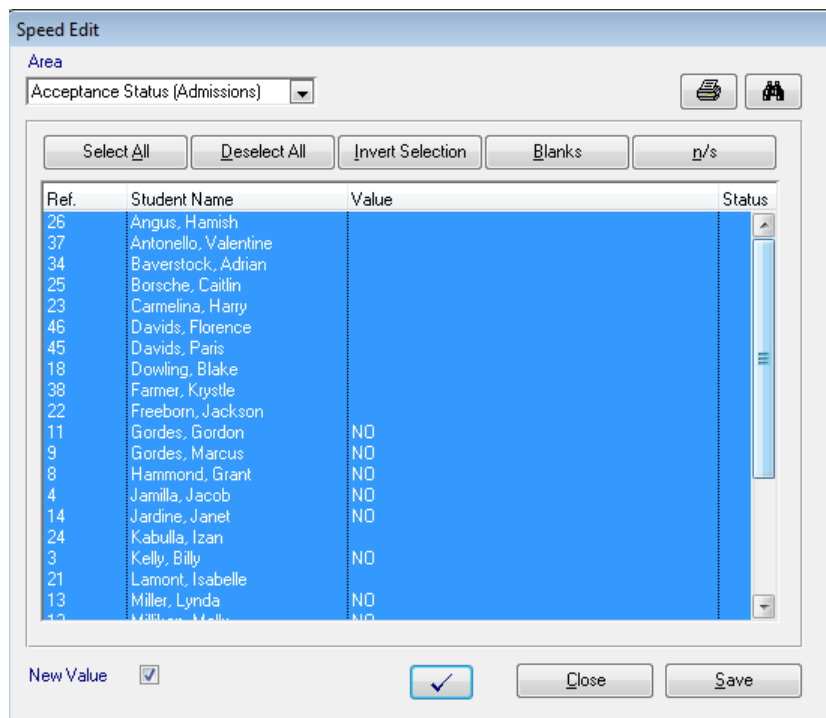
A screenshot of the 'Speed Edit' dialog box. It has a title bar 'Speed Edit' and a label 'Area'. Below the label is a dropdown menu showing 'Acceptance Status (Admissions)'.

Find  students on the **Admissions Roll** who are to be move 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 rows of search criteria: 'Surname/Ref. No.' with a text input field, 'Roll Status' with a dropdown menu showing 'Admissions', 'Preferred Name' with a text input field, and 'Year Group' with a dropdown menu showing '--n/s--'.

Click **Find**, **Select** and **Yes**

Click  to highlight the students



The Speed Edit dialog box is shown with the 'Area' dropdown set to 'Acceptance Status (Admissions)'. The 'Select All' button is highlighted. Below the buttons is a table with columns: Ref., Student Name, Value, and Status. The table contains 20 rows of student data. The 'Value' column for most students is empty, while for some it contains 'NO'. The 'Status' column is empty for all. At the bottom of the dialog, there is a 'New Value' checkbox (checked), an 'Apply' button (highlighted), a 'Close' button, and a 'Save' button.

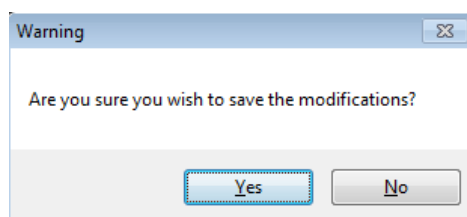
Ref.	Student Name	Value	Status
26	Angus, Hamish		
37	Antonello, Valentine		
34	Baverstock, Adrian		
25	Borsche, Caitlin		
23	Carmelina, Harry		
46	Dauids, Florence		
45	Dauids, Paris		
18	Dowling, Blake		
38	Farmer, Krystle		
22	Freeborn, Jackson		
11	Gordes, Gordon	NO	
9	Gordes, Marcus	NO	
8	Hammond, Grant	NO	
4	Jamilla, Jacob	NO	
14	Jardine, Janet	NO	
24	Kabulla, Izan		
3	Kelly, Billy	NO	
21	Lamont, Isabelle		
13	Miller, Lynda	NO	
12	Miller, Melly	NO	

Check **New Value** 

Click Apply Changes 

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

Click **Save**



A 'Warning' dialog box is shown with the text 'Are you sure you wish to save the modifications?'. There are two buttons: 'Yes' and 'No'.

Click **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 in to 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.**

## Activity:

Admin > Utilities > Admissions Transfer → Current Roll

Move the students to the Current Roll.

**Note:** This would only be undertaken once the students have arrived at the school.

**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 896

<< Back   Next >>   Cancel

Select the second option (*ignoring any Entry Dates that have been entered*)  
Enter the **Entry Date** as **1 February 2017**

Click **Next**

**Note:** The entry date is the student's first day of actual attendance at school. Any entry date against students will be over-written with the date entered in the previous screen.

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 **X** button.

Ref.	Name	DOB	Gender	UPN	Entry Date	Transfer?
26	Hamish Angus	25 SEP 2004	Male		30 JAN 2017	✓
37	Valentine Antonello	29 JAN 2004	Female		30 JAN 2017	✓
34	Adrian Bayerstock	27 MAR 2005	Male		30 JAN 2017	✓
25	Caitlin Borsche	10 APR 2013	Female		30 JAN 2017	✓
23	Harry Carmelina	10 APR 2013	Male		30 JAN 2017	✓
46	Florence Davids	19 JUN 2002	Female		30 JAN 2017	✓
45	Paris Davids	19 JUN 2002	Female		30 JAN 2017	✓
18	Blake Dowling	22 SEP 2012	Male		30 JAN 2017	✓
38	Krystle Farmer	26 MAY 2005	Male		30 JAN 2017	✓
22	Jackson Freeborn	10 APR 2013	Male		30 JAN 2017	✓
11	Gordon Gordes	25 FEB 2010	Male		30 JAN 2017	✓
9	Marcus Gordes	27 MAR 2012	Female		30 JAN 2017	✓
8	Grant Hammond	25 FEB 2003	Male		30 JAN 2017	✓
4	Jacob Jamilla	26 MAY 2005	Male		30 JAN 2017	✓
14	Janet Jardine	25 FEB 2010	Male		30 JAN 2017	✓

Next student number will be 896

<< Back Finish Cancel

**Note:** Students can be deselected by clicking on the X if they have not arrived at the school.

Click **Finish** and **OK**

If prompted to check for empty batches, click **Yes**

Delete batches

Do you wish to check for empty batches?

Yes No

Delete any empty batches

Click on the **Single User Lock** icon

Select Restore Multi User

Single User Lock

Restore Multi-user

Single User Status

Enter the password 'keys' and click **OK**

Single User Lock

Enter Password xxxxx

Cancel OK

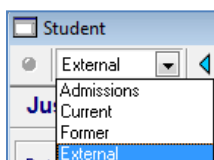
## 18 Step 17: Moving External Roll Students to the Former Roll (Discussion Only)

All students on the External Roll who are not returning to the school in 2017, should be moved to the Former Roll using the utility **Admin > Utilities > External Roll to Former Roll**

Edit existing External Roll Students and add a Leave Date.

### General > Student Details

Select the External Roll



Select the student/students required

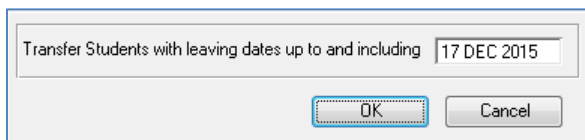
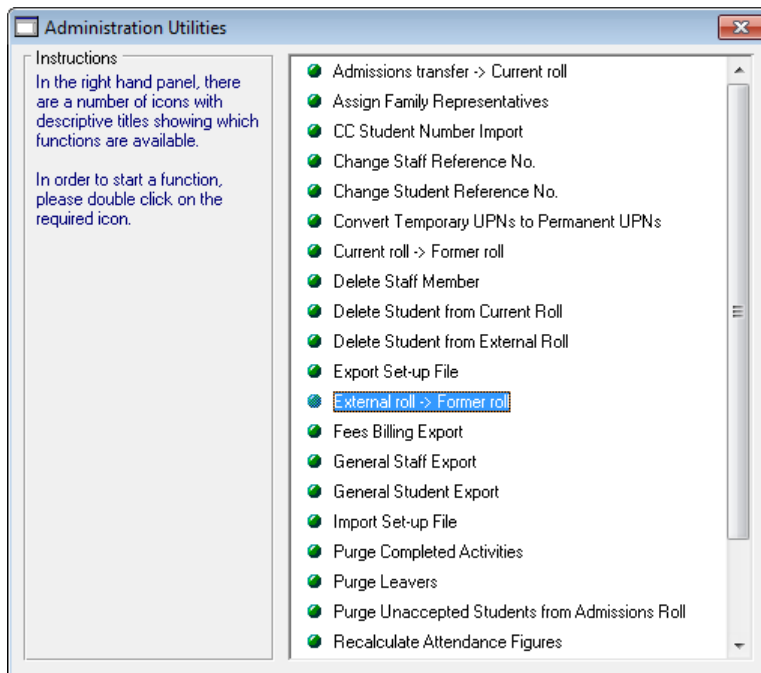
Click Edit

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

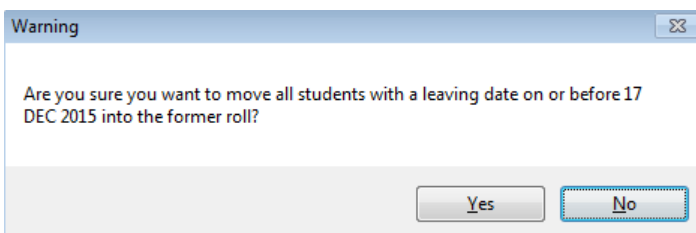
A screenshot of a software form titled 'Student Justin Badely'. The form has several tabs: Personal, Family Group, Additional, Movement Hist., Groups, UDI, Misc., Attendance Hist., Medical, and Activities. The 'Additional' tab is selected. The form contains various fields for student information, including Nationality, Religion, First Language, Indigenous Status, Study Type, Main Lang OTE SAH, and checkboxes for 'Mainly speak English at home?', 'LBOTE', 'Out of State', 'Out of Area', 'Access Restriction', 'Entered in SLP Program', 'Educational Support Program', 'EAL/D Stage', 'Documented Plan Completed', and 'In Care of DCP'. There are also fields for 'Australian Citizen / Permanent Resident', 'Date Arrival Australia', 'Visa Grant No.', 'Visa SC No. Expiry Date', 'Birth Certificate Seen', 'Country of Birth', 'Date Checked', 'Passport Sighted', and 'Passport Number'. The 'Leave Date' field is set to '17 DEC 2015'. The 'FTE' field is set to '0.40'. The 'Part Time Status' section has radio buttons for 'am', 'pm', 'n/a' (selected), and 'Custom'. The 'Documented Plan Review Date' and 'Documented Plan forwarded to DCP' fields are empty. The form has 'OK' and 'Cancel' buttons at the bottom right.

## Admin > Utilities > External Roll to Former Roll

Double Click on the Utility



Enter the Leave Date and Click **OK**



Click **Yes** to the Warning message



[View the Students on the Former Roll](#)

## General > Student Details

The Original Roll to which the student belonged is displayed on the Student Details screen for Former Roll students.

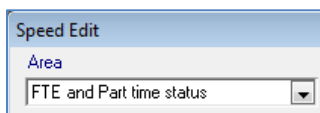
## 19 Step 18: Changing Students' FTE

Some students will need to have their FTE altered. This has an impact on both Lesson Attendance and Census.

### Activity: Increasing the FTE for Pre-Primary Students

#### Admin > Speed Edit

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

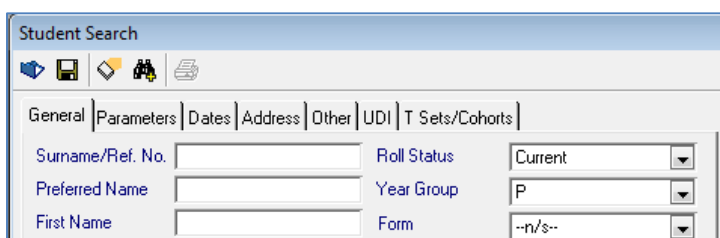


Speed Edit

Area

FTE and Part time status

- Find the students in **Year P**



Student Search



General Parameters Dates Address Other UDI T Sets/Cohorts

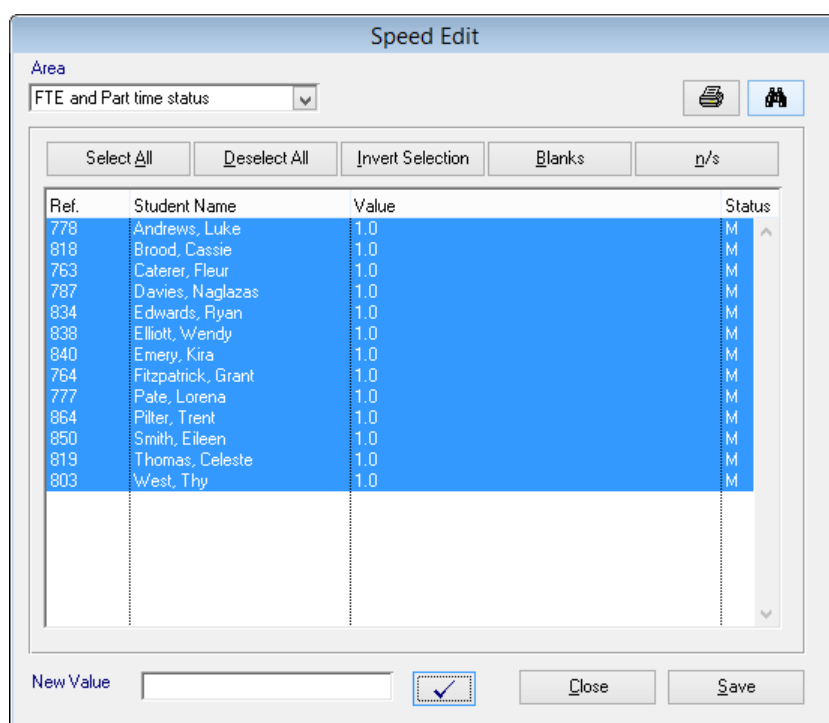
Surname/Ref. No.  Roll Status

Preferred Name  Year Group

First Name  Form

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

- Click 
- Enter a **New Value** of **1.00**
- Click Apply Changes 



Speed Edit

Area

FTE and Part time status

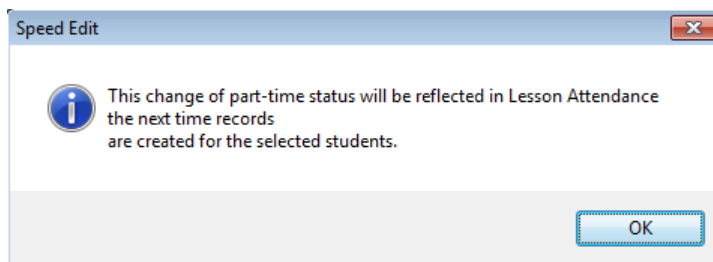
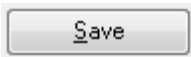
Select All Deselect All Invert Selection Blanks n/s

Ref.	Student Name	Value	Status
778	Andrews, Luke	1.0	M
818	Brood, Cassie	1.0	M
763	Caterer, Fleur	1.0	M
787	Davies, Naglazas	1.0	M
834	Edwards, Ryan	1.0	M
838	Elliott, Wendy	1.0	M
840	Emery, Kira	1.0	M
764	Fitzpatrick, Grant	1.0	M
777	Pate, Lorena	1.0	M
864	Pilger, Trent	1.0	M
850	Smith, Eileen	1.0	M
819	Thomas, Celeste	1.0	M
803	West, Thy	1.0	M

New Value

Close Save

- Click

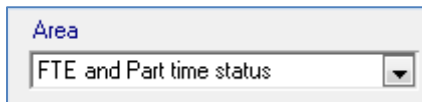


- Click **OK** and **Yes**

## Activity: Check the FTE for Kindergarten Students

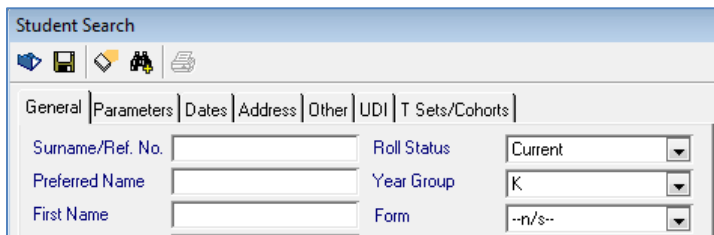
### Decreasing the FTE

Leave the area as FTE and Part time status



Area  
FTE and Part time status

Select Year Group K



Student Search


General Parameters Dates Address Other UDI T Sets/Cohorts

Surname/Ref. No.  Roll Status

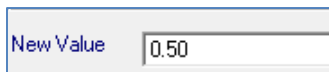
Preferred Name  Year Group

First Name  Form

Click **Find**, **Select** and **Yes**

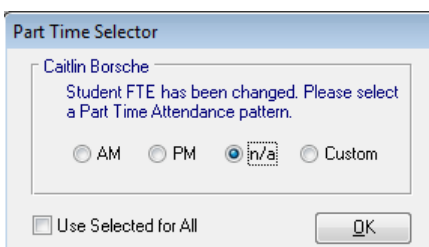
Click 

- Edit the FTE for the Kindergarten student to **0.50**



New Value

- Click to Apply Change 
- Click **Save**, **OK**, **Yes**



Part Time Selector

Caitlin Borsche

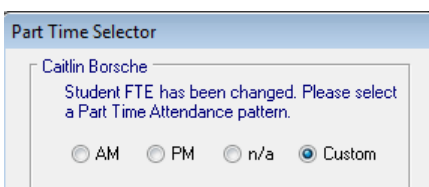
Student FTE has been changed. Please select a Part Time Attendance pattern.

☐ AM ☐ PM ☒ n/a ☐ Custom

☐ Use Selected for All

**If Schools have not yet determined the part-time attendance pattern, then stop at this point.**

Click in the **Custom** button



Part Time Selector

Caitlin Borsche

Student FTE has been changed. Please select a Part Time Attendance pattern.

☐ AM ☐ PM ☐ n/a ☒ Custom

Assign an attendance pattern by clicking on the cells where the students will NOT attend

**Part Time Selector**

Caitlin Borsche  
Student FTE has been changed. Please select a Part Time Attendance pattern.

☐ AM ☐ PM ☐ n/a ☒ Custom

Attendance Pattern

Day	AM	PM
Monday	✓	✓
Tuesday	✓	✓
Wednesday	✓	
Thursday		
Friday		

☐ Use Selected for All

Click **Use Selected for All**

Attendance Pattern

Day	AM	PM
Monday	✓	✓
Tuesday	✓	✓
Wednesday	✓	
Thursday		
Friday		

☒ Use Selected for All

Click **OK**

### 19.1.1 Notes on Kindy Part-time Attendance Patterns

**Notes:** If students are attending 0.5 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 Lesson Attendance 10 Day Cycle information at the link below to set this up. If required, this must be done before creating Daily Records in Lesson Attendance.

**The Enforced School Closure Function is used to close school for Kindy students on the days they are not due to attend. This can only be done after the New Attendance Year has been set up.**

<http://det.wa.edu.au/intranet/stims/detcms/intranet/student-information-management-system/sis-administration/lesson-attendance-module/fact-sheets/kindy-10-day-cycle-setup>

## 20 Step 19: Updating Staff Details

When new staff commence at school, they must be entered in **Staff Details**. Similarly, if staff leave the school, they must be transferred to the Previous Employer Roll

### 20.1 Adding New Staff

#### Activity:

Add yourself as a member of staff.

#### General > Staff Details

Click Add 

Enter the following information about yourself, tabbing between the fields:

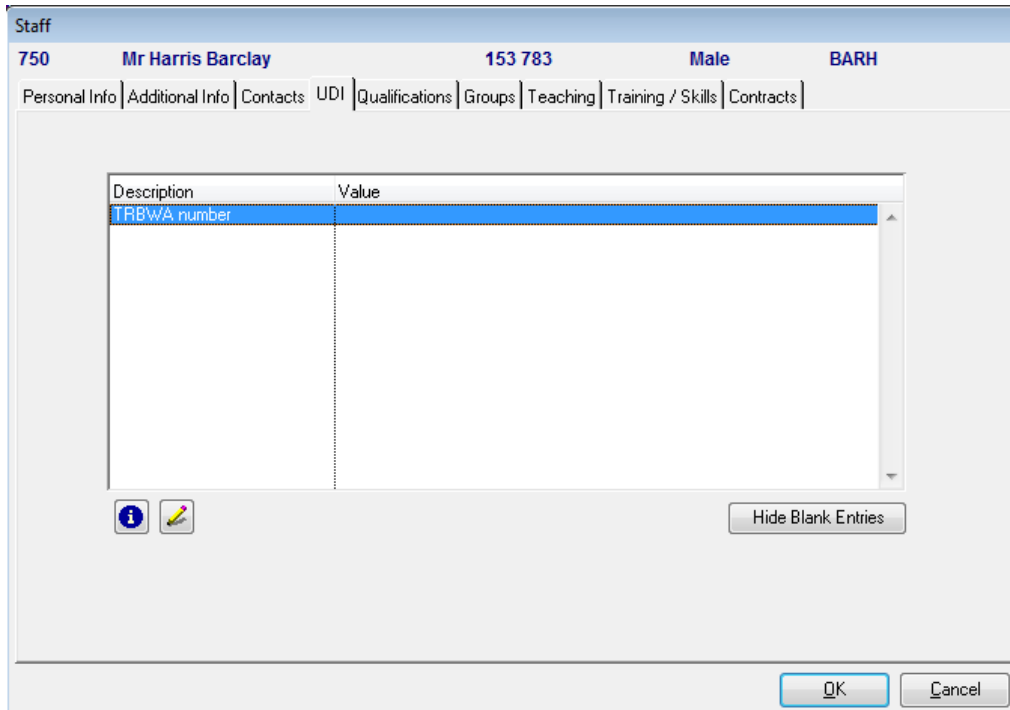
- Title
- Surname \*
- First Name \*
- Gender\*
- Date of Birth \*
- Staff Code \*(first three letters of your surname and your first initial)
- ID Number\*
- Staff Type

**Note:** \* indicates the field is mandatory

## UDI – TRBWA


Click on the **UDI** tab to enter the details of the **TRBWA** number.

Highlight **TRBWA Number**

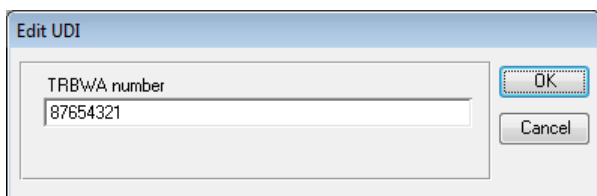


The screenshot shows the 'Staff' window for Mr Harris Barclay (ID 750, 153 783, Male, BARH). The 'UDI' tab is selected. A table with two columns, 'Description' and 'Value', is displayed. The first row is highlighted in blue and contains the text 'TRBWA number'. Below the table are icons for information and edit, and a 'Hide Blank Entries' button. At the bottom of the window are 'OK' and 'Cancel' buttons.

Description	Value
TRBWA number	

Click on the Edit 

Enter the **TRBWA** number



The 'Edit UDI' dialog box is shown. It has a text input field labeled 'TRBWA number' containing the value '87654321'. To the right of the input field are 'OK' and 'Cancel' buttons.

Click **OK** to save the number

Click **OK** to save the Staff Details entered

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

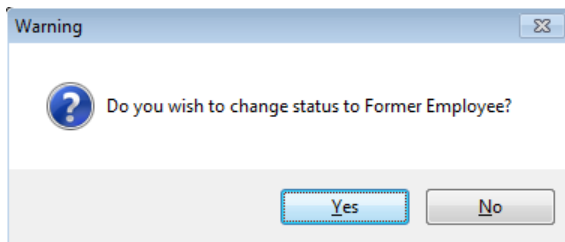
### Activity:

#### General > Staff Details

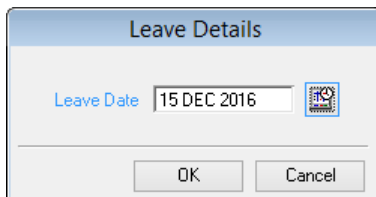
Robert Charlton has left the school

**Search**  CHA,R for his records

Click Move Entry to Previous Employee Roll 



Click **Yes**



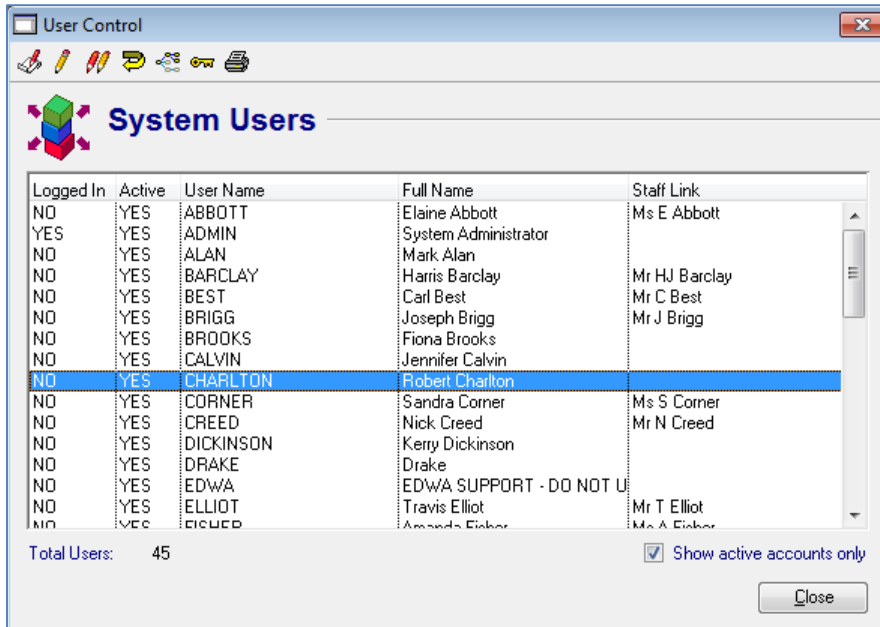
Enter a **Leave Date** and click **OK**

## 20.3 Update Integris Users

### 20.3.1 Flag Staff who have Left as Inactive Users

#### Activity:

##### General > Control > Users




**User Control**

**System Users**

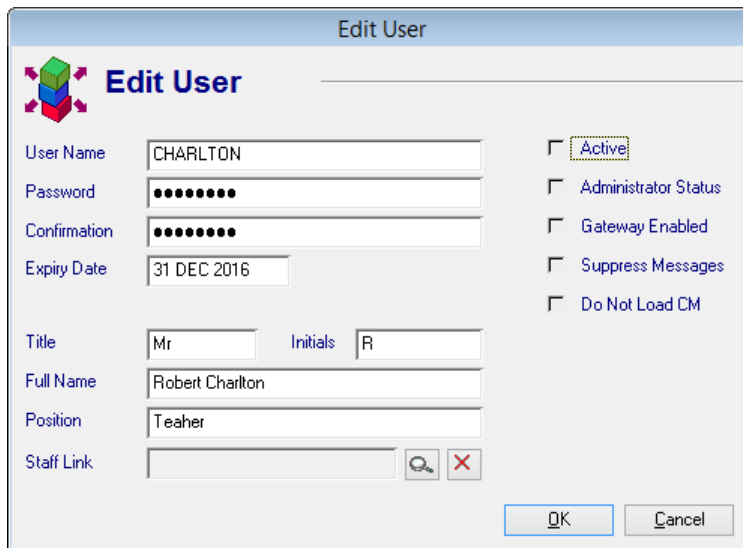
Logged In	Active	User Name	Full Name	Staff Link
NO	YES	ABBOTT	Elaine Abbott	Ms E Abbott
YES	YES	ADMIN	System Administrator	
NO	YES	ALAN	Mark Alan	
NO	YES	BARCLAY	Harris Barclay	Mr HJ Barclay
NO	YES	BEST	Carl Best	Mr C Best
NO	YES	BRIGG	Joseph Brigg	Mr J Brigg
NO	YES	BROOKS	Fiona Brooks	
NO	YES	CALVIN	Jennifer Calvin	
NO	YES	CHARLTON	Robert Charlton	
NO	YES	CORNER	Sandra Corner	Ms S Corner
NO	YES	CREED	Nick Creed	Mr N Creed
NO	YES	DICKINSON	Kerry Dickinson	
NO	YES	DRAKE	Drake	
NO	YES	EDWA	EDWA SUPPORT - DO NOT U	
NO	YES	ELLIOT	Travis Elliot	Mr T Elliot
NO	YES	FISHER	Ms A Fisher	

Total Users: 45 ☒ Show active accounts only

Close

Select the staff member who has left and click Edit 

Uncheck **Active** ☐ Active



**Edit User**

User Name: CHARLTON ☐ Active

Password:  ☐ Administrator Status

Confirmation:  ☐ Gateway Enabled

Expiry Date: 31 DEC 2016 ☐ Suppress Messages

☐ Do Not Load CM

Title: Mr Initials: R

Full Name: Robert Charlton

Position: Teacher

Staff Link:

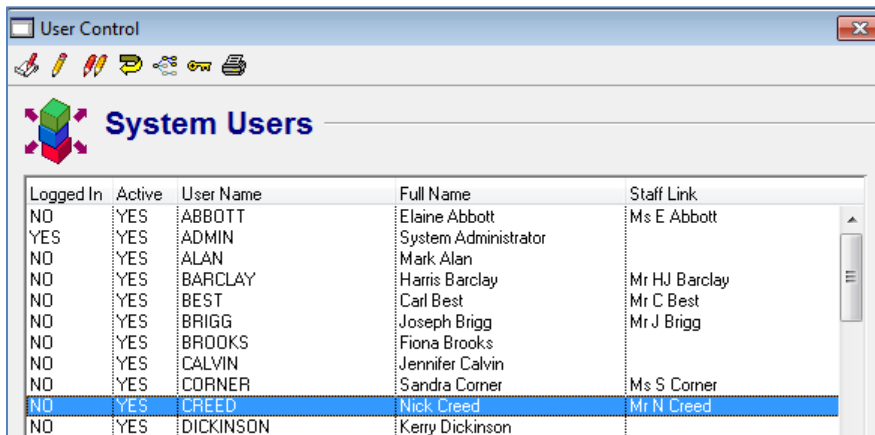
OK Cancel

Click **OK**


## 20.3.2 Edit Expiry Dates for Continuing Users

### Activity:

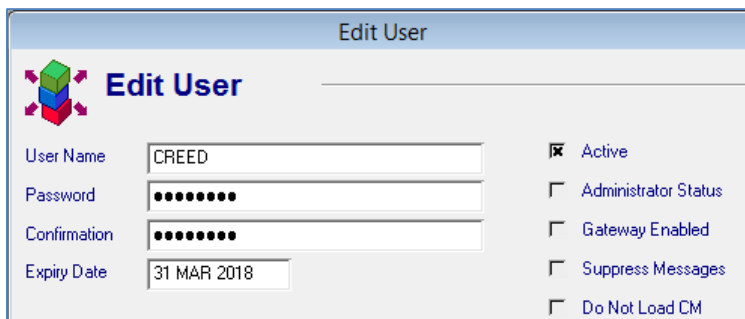
#### General > Control > Users



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
NO	YES	BEST	Carl Best	Mr C Best
NO	YES	BRIGG	Joseph Brigg	Mr J Brigg
NO	YES	BROOKS	Fiona Brooks	
NO	YES	CALVIN	Jennifer Calvin	
NO	YES	CORNER	Sandra Corner	Ms S Corner
NO	YES	CREED	Nick Creed	Mr N Creed
NO	YES	DICKINSON	Kerry Dickinson	

Select a staff member who's account needs updating and click Edit 

Enter a new **Expiry Date**



Edit User	
User Name	CREED
Password	.....
Confirmation	.....
Expiry Date	31 MAR 2018
<input checked="" type="checkbox"/>	Active
<input type="checkbox"/>	Administrator Status
<input type="checkbox"/>	Gateway Enabled
<input type="checkbox"/>	Suppress Messages
<input type="checkbox"/>	Do Not Load CM

Click **OK**

**Note:** At school this would be repeated for all continuing Users. It is recommended that the expiry dates are not set for the very end of the year, at or the very beginning of the new year, as these are times when office staff are very busy.

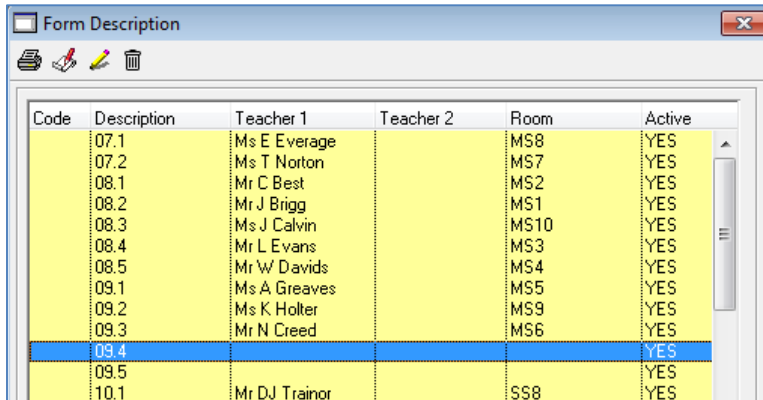
## 21 Step 20: Update Form Descriptions

If you have added new staff members you can now attach the names of each Form Teacher for the new academic year.



### Activity:

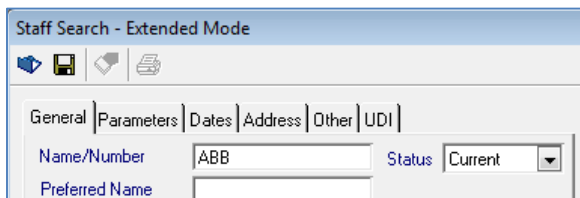
#### General > Parameters > Form Descriptions

- Select the Form **9.4**



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

- Click Edit 
- Click Find Form Teacher 
- Type **ABB** in the Name/Number field and click **Find**



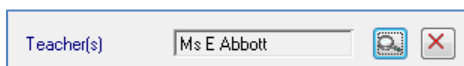
Staff Search - Extended Mode



General | Parameters | Dates | Address | Other | UDI

Name/Number: ABB Status: Current

Preferred Name:

- Elaine Abbott's name will be added to the Teacher field





Teacher(s) Ms E Abbott  

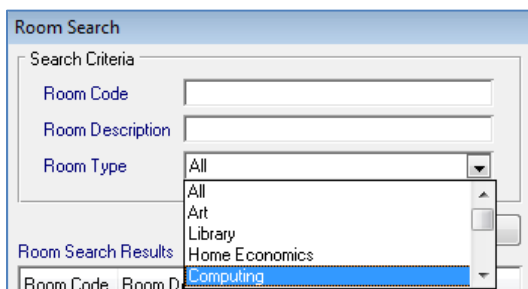
- Click on **OK**
- Add yourself as the Form Teacher for **Form 9.5**

## Activity:

### General > Parameters > Form Description

Sometimes it is necessary to make changes to rooms for teachers and subjects.

- Select Form **9.3**
- Click Edit 
- Click Find Form Room 
- Click **Find** by **Room Type – Computing**

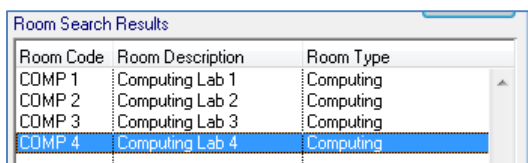


The Room Search dialog box shows search criteria. The Room Type dropdown is open, showing a list of room types: All, Art, Library, Home Economics, and Computing. Computing is selected and highlighted in blue.



Click

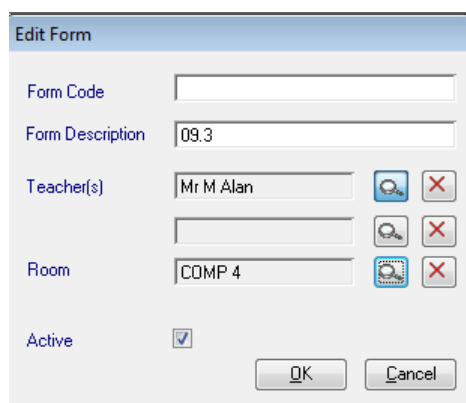
Find

- Highlight **COMP4 Computing Lab 4** and click **Select**



Room Code	Room Description	Room Type
COMP 1	Computing Lab 1	Computing
COMP 2	Computing Lab 2	Computing
COMP 3	Computing Lab 3	Computing
COMP 4	Computing Lab 4	Computing

- Click Remove Link to Teacher  and **Yes**
- Click Find Form Teacher 
- Type **ALAN** in the **Name/Number** field
- Select **Mark Alan**



The Edit Form dialog box shows the following fields: Form Code (empty), Form Description (09.3), Teacher(s) (Mr M Alan), Room (COMP 4), and Active (checked). There are search and remove icons for the Teacher(s) and Room fields. OK and Cancel buttons are at the bottom.


- Click **OK**

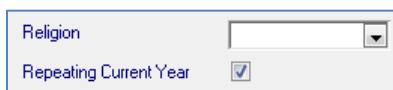
## 22 Step 21: Repeating Students

Ensure that for any students repeating an academic year, **Repeating Current Year** on the **Miscellaneous** tab in **Student Details** has been checked.

### Activity:

#### General > Student Details

- Locate **Abrey Stewart's records**
- Click Edit 
- Select the **Miscellaneous** tab
- Under **Other Information** check **Repeating Current Year**



Religion

Repeating Current Year ☒

- Click **OK**

**Note:** This function needs to be run in Single User mode.

## 23 Step 22: Assigning Family Representative Status

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.

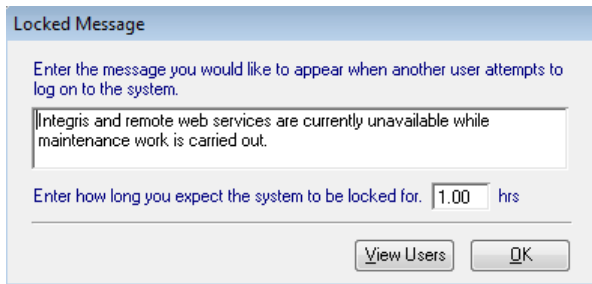
Users may wish to control the allocation of family representatives manually. However, to assist in the flagging of representatives a utility is provided.

## Activity:

### File > Single User Lock



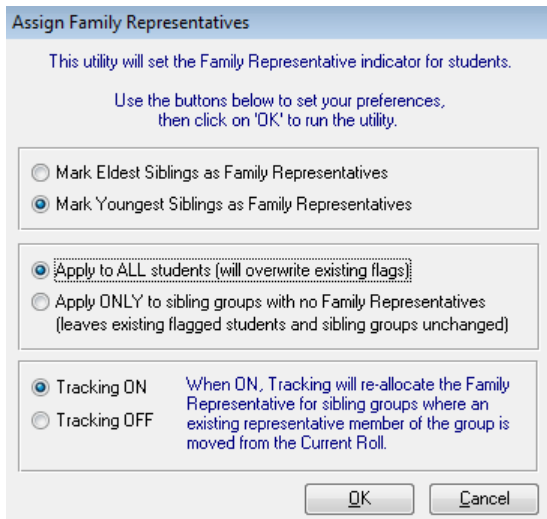
Enter **Keys** and click **OK**



Click **OK** again

### Admin > Utilities > Assign Family Representatives

Enter the following settings:



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

Click the **Single User** mode icon  
Click **Restore Multi-user**  
Enter **Keys** and click **OK**



## 24 Step 23: Print State Archives Report

As part of the 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 left students held within SIS are required to be produced in a hardcopy format.

The process will include:

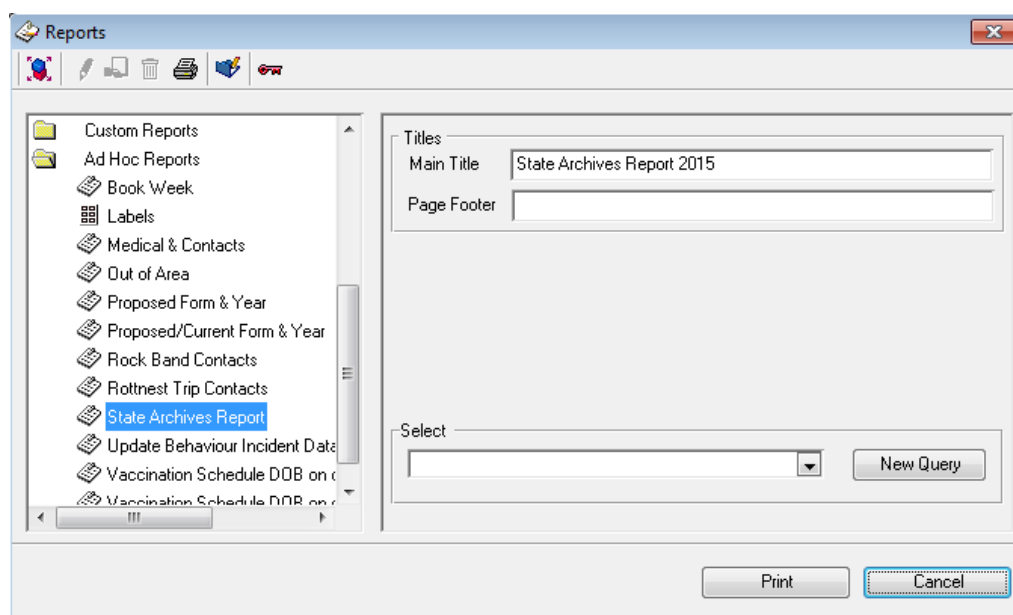
- Producing the relevant printout (this will list the various student enrolment details for left students only).
- Saving the hardcopy report in a file created in the 859 category of the School Filing System e.g., 859/nn STUDENTS – ENROLMENTS – Enrolment details of students who left **[name of school]** during the current year.
- Retaining the file as an archival record and holding for one year.

At the end of one 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.

### Activity:

#### Admin > Reports > Ad Hoc Reports

- Open **Ad Hoc Reports** folder



- Highlight **State Archives Report**
- Add **2016** 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**  
Set Roll Status to: **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 **Dates** tab

- Select the students within the year's **Leaving Date** range in 2016

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 2016 31 DEC 2016

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

- Click **Find**, **Select** and **Yes**
- Print** the report to the screen
- Close Reports

**Note: A copy of this report needs to be saved to the 859 category of the School Filing System, that is 859/nn STUDENTS > ENROLMENTS > Enrolment details of students who left [name of school] in 2016.**

**Retain this file as an archive record and store for one year. At the end of one 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.**

## 25 Step 24: Set up New Attendance Year

Setting up the New Attendance Year only applies to schools that currently use the Lesson Attendance module.

Ensure the datafile has been backed up before proceeding.

Secondary schools, before proceeding it is important that you ensure the school's timetable specifies which periods are AM and which are PM in **Timetabling > Timetable Setup > Timetable Cycles > Master Period Structure**.

**Note: If you require assistance with creating the new attendance year please contact the Customer Service Centre.**

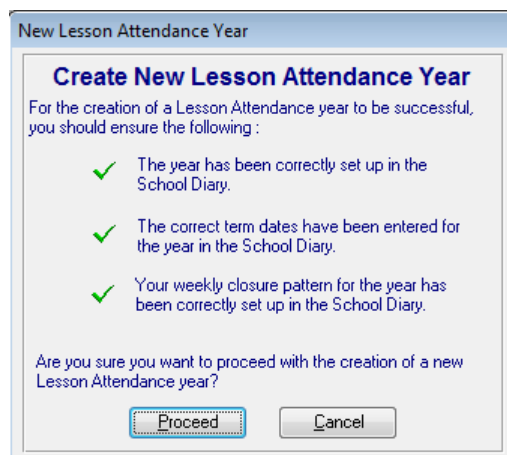
**Metro 9264 5555**

**Count 1800 012 828**

### Activity: Set up the New Attendance Year

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

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



Click **Proceed**

Enter the following dates

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

2016

New Year

2017

Start of Academic Year

30 JAN 2017

Start of Attendance Year

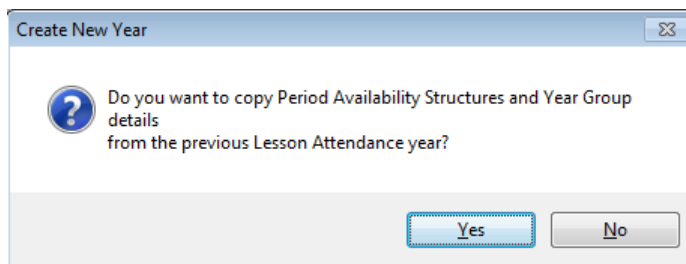
30 JAN 2017

OK

Cancel

Click **OK**

**IMPORTANT:**  
***The Attendance Year must ALWAYS commence on a Monday.***  
***If an FTE Warning Report opens at this point check the information on page 90.***



Click **Yes**

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

The cycles reflect the term data entered in the School Diary. Cycle descriptions can be edited to display in Day View with 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

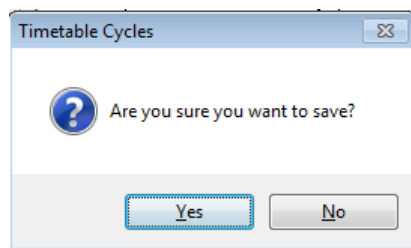
Overtyping **Week 11 and 12** with **Holidays**

Overtyping **Week 13** with **Term 2 Week 1**

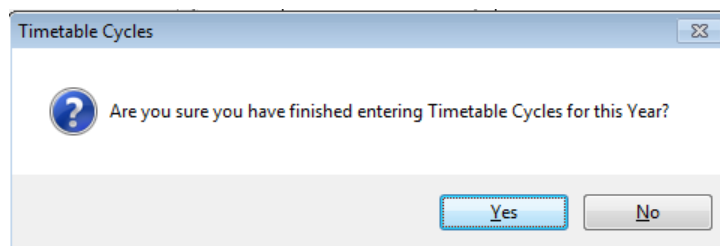
Cycle No	Start Date	Description
1	Mon 30 JAN 2017	Term 1 Week 1
2	Mon 6 FEB 2017	Term 1 Week 2
3	Mon 13 FEB 2017	Term 1 Week 3
4	Mon 20 FEB 2017	Term 1 Week 4
5	Mon 27 FEB 2017	Term 1 Week 5
6	Mon 6 MAR 2017	Term 1 Week 6
7	Mon 13 MAR 2017	Term 1 Week 7
8	Mon 20 MAR 2017	Term 1 Week 8
9	Mon 27 MAR 2017	Term 1 Week 9
10	Mon 3 APR 2017	Term 1 Week 10
11	Mon 10 APR 2017	Holidays
12	Mon 17 APR 2017	Holidays
13	Mon 24 APR 2017	Term 2 Week 1

**Note: In school, you would continue to edit the descriptions for the entire year.**

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

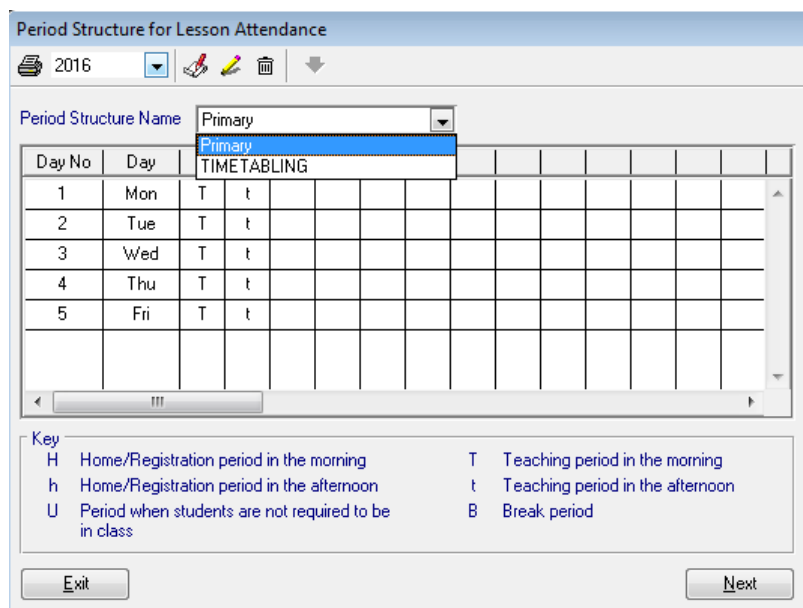


Click

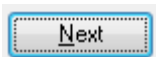


Click **Yes**

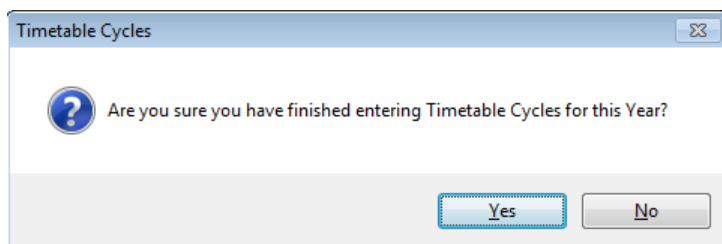
View the available period structures



Click



**Note: Alternative period structures could be added if required.**



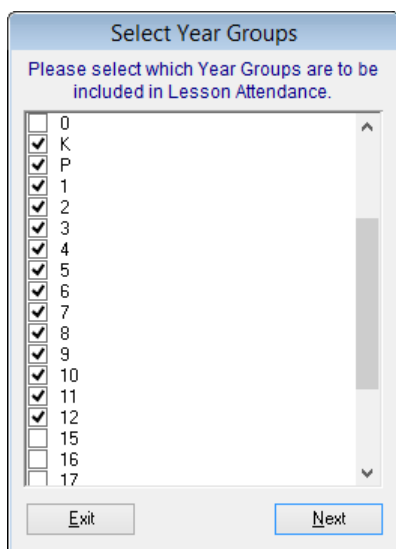
Timetable Cycles

Are you sure you have finished entering Timetable Cycles for this Year?

Yes No

Click **Yes**

Check the box for **K** and ensure **Year Groups K to 12** are selected to be included in Lesson Attendance



Select Year Groups

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

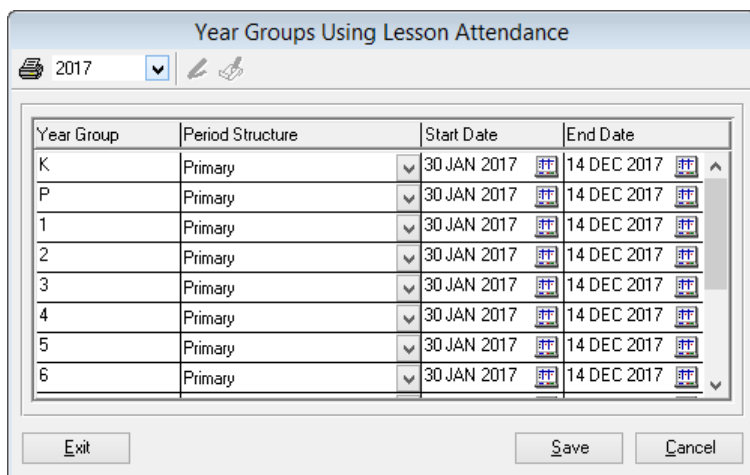
<input type="checkbox"/>	0
<input checked="" type="checkbox"/>	K
<input checked="" type="checkbox"/>	P
<input checked="" type="checkbox"/>	1
<input checked="" type="checkbox"/>	2
<input checked="" type="checkbox"/>	3
<input checked="" type="checkbox"/>	4
<input checked="" type="checkbox"/>	5
<input checked="" type="checkbox"/>	6
<input 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

Exit Next

Click **Next**

Add the Primary Period Structure to include the **K** students

Select the appropriate **Period Structure** for each year group including Kindergarten as Primary and Year 7 – 12 as Timetabling



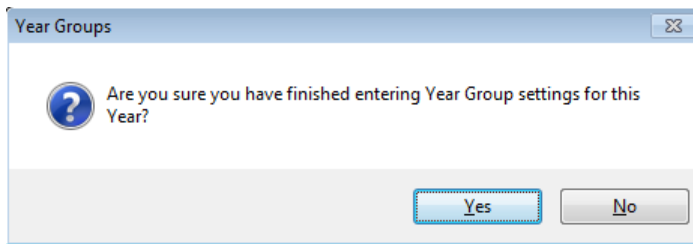
Year Groups Using Lesson Attendance

2017

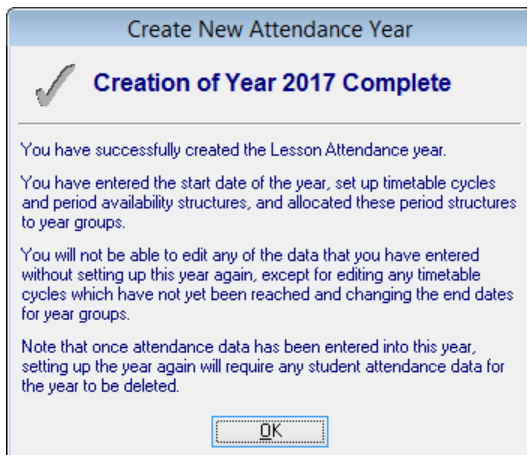
Year Group	Period Structure	Start Date	End Date
K	Primary	30 JAN 2017	14 DEC 2017
P	Primary	30 JAN 2017	14 DEC 2017
1	Primary	30 JAN 2017	14 DEC 2017
2	Primary	30 JAN 2017	14 DEC 2017
3	Primary	30 JAN 2017	14 DEC 2017
4	Primary	30 JAN 2017	14 DEC 2017
5	Primary	30 JAN 2017	14 DEC 2017
6	Primary	30 JAN 2017	14 DEC 2017

Exit Save Cancel

Click **Save** and **Finish**



Click **Yes**



Click **OK**

### **IMPORTANT**

***Year 11 and 12 End Dates will need to be edited once they have been determined for 2017 through - Lesson Attendance > Parameters > Year Groups.***

### 25.1.1 Create New Year FTE Warning

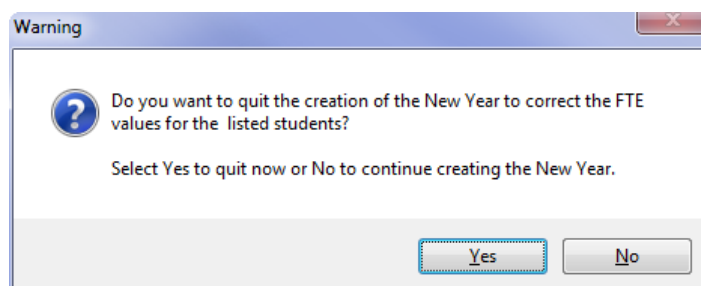
If Kindy and/or Pre-Primary students are included in the Lesson Attendance module and any of these students in your Datafile do not have an expected FTE, a Report will run to display these students.

Student FTE values should be corrected before creating the New Attendance Year. The Report will display any Kindy students that have an FTE value of 1.00 or any students from Pre-Primary upwards that have an FTE Value of less than 1.00

A Sample Report is shown below.

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
Caitlin Borsche	K	Not specified	1.00	<1.00
Harry Carmelina	K	Not specified	1.00	<1.00
Blake Dowling	K	Not specified	1.00	<1.00
Jackson Freeborn	K	Not specified	1.00	<1.00
Marcus Gordes	K	Not specified	1	<1.00
Izan Kabulla	K	Not specified	1.00	<1.00
Isabelle Lamont	K	Not specified	1.00	<1.00
Naomi Newbery	K	Not specified	1.00	<1.00
Skye Wilson	K	Not specified	1.00	<1.00
Total in Year K: 9				
Luke Andrews	P	K/P	0.60	1.0
Cassie Brood	P	K/P	0.40	1.0
Fleur Caterer	P	K/P	0.40	1.0
Naglzas Davies	P	K/P	0.40	1.0
Ryan Edwards	P	K/P	0.40	1.0
Wendy Elliott	P	K/P	0.40	1.0
Kira Emery	P	K/P	0.40	1.0
Grant Fitzpatrick	P	K/P	0.40	1.0
Lorena Pate	P	K/P	0.40	1.0
Trent Pilter	P	K/P	0.40	1.0
Eileen Smith	P	K/P	0.40	1.0
Celeste Thomas	P	K/P	0.40	1.0
Thy West	P	K/P	0.40	1.0

The following warning will also display



Clicking on Yes will allow you to go back and edit any FTE Values for students that are not correct. Clicking on No allows the User to complete the set-up of the New Year.

## 26 Step 25: Notification of Transfer

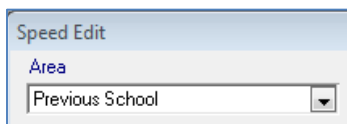
Schools are reminded that they must provide written or electronic notification of the date an enrolment commences to the school where the new student was previously enrolled. This includes notification to Primary schools when students are enrolling in Secondary school for the first time.

### Activity: Print a List of New Enrolments

Admin > Speed Edit

#### Confirming Enrolment to the Previous School

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

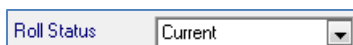


Speed Edit

Area

Previous School

Open the **Student Search** window  and select the **Current Roll**

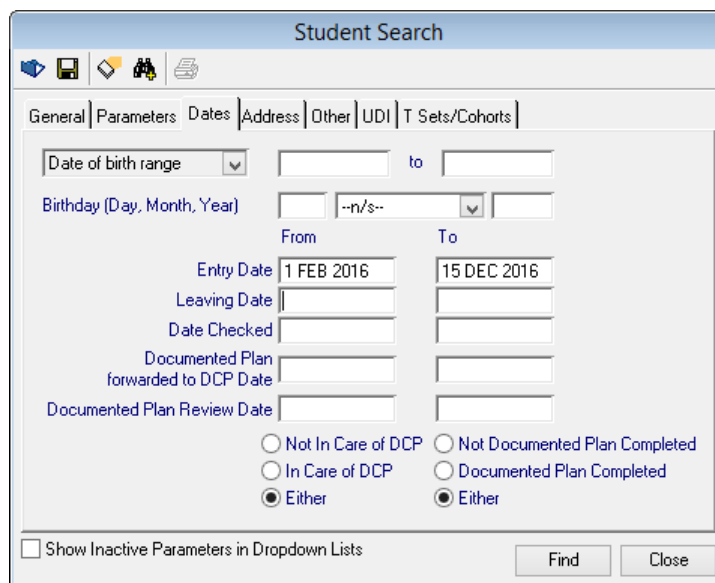


Roll Status

Current

In the **Dates** tab, enter an **Entry date of 1 FEB 2016**

**Note:** When this activity is performed as part of the year end activities, the date range would commence from the first day of the school year to the current date.



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: 1 FEB 2016 15 DEC 2016

Leaving Date: [ ] [ ]

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

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

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

Click on the **Value** header and scroll down


Speed Edit

Area

Previous School

Select All Deselect All Invert Selection Blanks n/s

Ref.	Student Name	Value	Status
895	Ballarat, Wendy	Northern Territory	
829	Delphine, Grant	Orana Catholic School (Willetton)	
812	Kinnane, Benn		
779	Liebelt, Marija		
754	Lim, Bunthy		
786	McNaughton, Michelle		
788	Price, Natasha		

To print the list, select the printer icon 

**Note: 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.**

## 27 Step 26: Checking Student's Destination School

Schools must also resolve the destination of each leaving student, including those students making the transition from Primary to High School, Middle School or Senior Campus. To assist in this process, schools can print a list of all students on the Former Roll displaying their destination school.

### Activity: Check Student's Destination School

#### Admin > Speed Edit

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

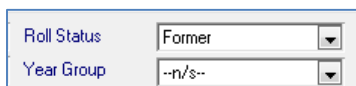


Speed Edit

Area

Destination

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



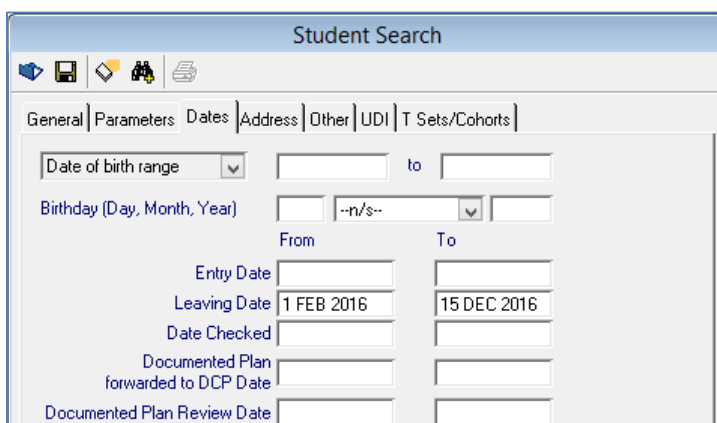
Roll Status

Former

Year Group

--n/s--

In the **Dates** tab, enter a **Leaving Date** range of the previous school year



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 FEB 2016 15 DEC 2016


Date Checked

Documented Plan forwarded to DCP Date

Documented Plan Review Date

Click **Find**, **Select** and **Yes**

A list of students and their destination school will be displayed

To print the list, select the printer icon 

Where an advice of transfer has not been received for a particular student, the school should follow up with the parent(s) to determine the destination and confirm the enrolment with the new school. Where schools are unable to verify student destination following investigation, the child may be considered 'whereabouts unknown' and should be referred to the Student Tracking Officer through the District Attendance Coordinator.

**Note: Further information outlining this process can be found at <http://bswb.det.wa.edu.au>**

## 28 Step 27: Purge the Audit Trail

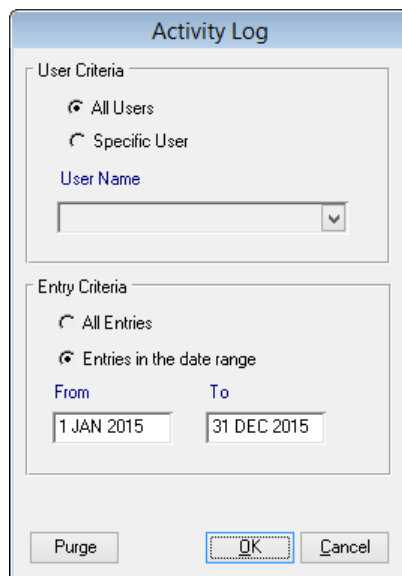
Electronic Records of user activity are purged to a text file and saved, then deleted from the software. The previous year's records are kept on the system, however those for the year before last year are purged.

### Activity:

#### General > Control > Audit

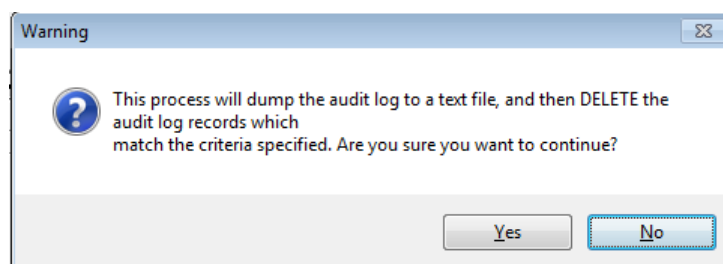
Select **All Users** and **Entries** in the date range.

Enter the date range for the calendar year e.g. **01 JAN 2015** to **31 DEC 2015**

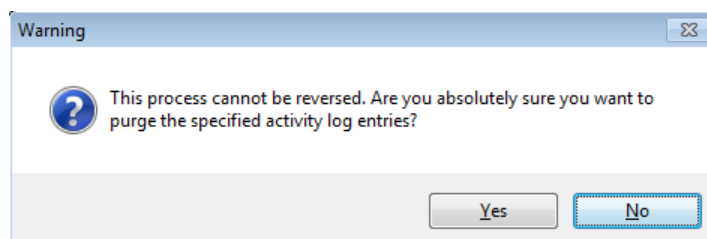
The 'Activity Log' dialog box has two sections. The 'User Criteria' section has two radio buttons: 'All Users' (selected) and 'Specific User'. Below is a 'User Name' dropdown menu. The 'Entry Criteria' section has two radio buttons: 'All Entries' and 'Entries in the date range' (selected). Below are 'From' and 'To' date fields with the values '1 JAN 2015' and '31 DEC 2015' respectively. At the bottom are 'Purge', 'OK', and 'Cancel' buttons.

Click

Purge

A 'Warning' dialog box with a question mark icon. The text reads: '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 are 'Yes' and 'No' buttons.

Click **Yes** and **Yes** to the second message

A 'Warning' dialog box with a question mark icon. The text reads: 'This process cannot be reversed. Are you absolutely sure you want to purge the specified activity log entries?'. At the bottom are 'Yes' and 'No' buttons.

Save to **C:\Keys\Integris\Outbox** with the file name: **2015 Audit Log**

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## 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 Fax (CSC)

9264 4701

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

### 29.3 Email (CSC)

[customer.servicecentre@education.wa.edu.au](mailto:customer.servicecentre@education.wa.edu.au)

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

## 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.

<http://www.det.wa.edu.au/intranet/stims>

Links to the Integris Manuals are also available from the STIMS website or by going to Help within Integris.