

# End of Year Procedure Guide 2022/23 for Secondary Schools



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# Bromcom MIS End of Year Procedure

## Basic Guidelines

This procedure can be undertaken at any point in the current **Academic Year**, but it is best to wait until the information that you are entering is no longer subject to change.

If your system is not Cloud-based, then it is your responsibility to ensure a backup has been made prior to undertaking the end of year procedure.

There is no **End of Year** application to be run as such. The **End of Year** procedure consists of creating and configuring the various **Curriculum** and **Calendar** components that make up the forthcoming **Academic School Year**. Follow all the steps appropriate for your system, in sequence.

## Preparing for the End-of-Year

It is recommended that you first **tidy up the current Academic Year**.

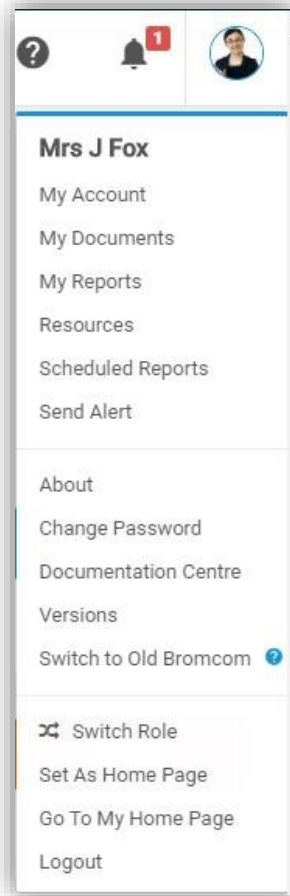
Check with your colleagues what they want to carry through from the current **Academic Year** to the next.

- Will the **Heads of Year** (or their equivalent) and other staff associated with the **Year**, be promoted with their **Year Group**?
- What will this year's **Tutor Groups** be called next year? Will they have the same **House, Staff** and/or **Room** associated with them?
- Which of the current **Classes** will continue through into next year e.g., **Exam Classes** following a two-year course, Year 8 into Year 9, etc?
- Have you checked the end dates of your current classes and tutor groups? They must end before the start of the next academic year. If you need to edit your classes and group end dates, please read the following guide: [How to Bulk Edit Group End Dates](#)

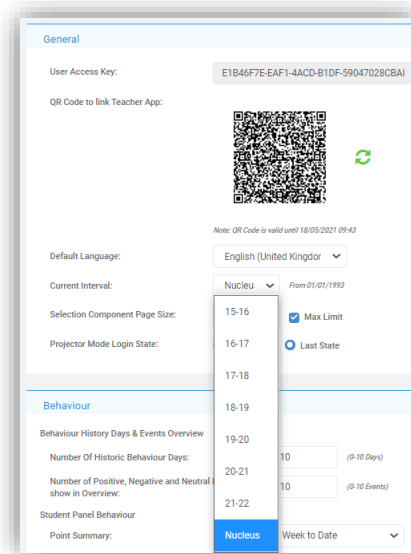
## Interval setting for the End-of-Year.

Set your **Current Interval** on the **My Account** page to **Nucleus**, that way you will have access to all **Academic Years** including the new one when you create it.

To change this setting, click on your **Profile Menu** and then click on **My Account** in the dropdown menu.



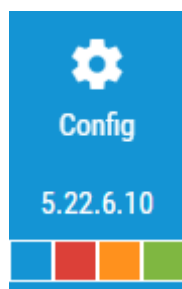
If you need to change your **Interval**, click on the down arrow, and select the **Nucleus** interval.



Make sure that you have the necessary permissions to all the relevant menu items. An **Administrator** will have access by default.

Before beginning your **End of Year Procedure**. Please ensure that you are running version **5.22.6.10** or **later**. The **Version Number** is displayed in the bottom left of all pages once logged into the MIS.

If you are using the Cloud System, then you will be running the latest version.



# 1 Creating a New Period Structure

You only need to complete this section if you plan to use a DIFFERENT **Period Structure** next year, for example if you are changing the shape of the school day or moving to a 2-week timetable, etc. Otherwise, you can **skip this step** and continue to **Section 2**.



If you use detentions and you create a new period structure, you will need to set up the detention scheduling again for the new academic year.

Ensure that you are using a **user account** that has been given the relevant **Roles & Permissions**.

Go to **Config>Curriculum>Configurations**. Check these and if necessary, adjust them.

Defaults for Period Durations					
AM Reg Duration*	<input type="text" value="20"/>	minutes	PM Reg Duration*	<input type="text" value="12"/>	minutes
Class Duration*	<input type="text" value="60"/>	minutes	Max Class Duration*	<input type="text" value="60"/>	minutes

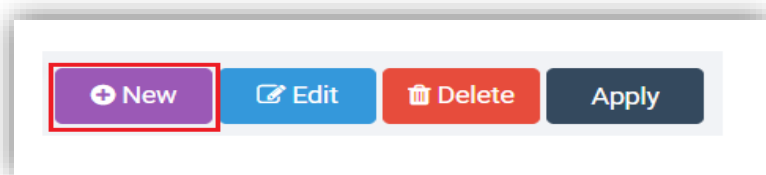
Set the default durations of your new **Period Structure: AM, PM, and Class Periods**.

Don't worry - Any changes made on this screen **will not** affect the current year's data.

The **Class Duration** refers to the length of the **Period** and the **Max Class Duration** refers to the maximum length a **Period** can be. For example each **Period** of the day may have a duration of 40 minutes, but the last **Period** on Friday may be 60 minutes. Therefore the **Class Duration** would be 40 and the **Max Class Duration** 60 allowing for a **Period** up to 60 minutes.

Click on **SAVE** to save any changes.

Go to **Config>Curriculum>Period Structures** and click on the **New** button.



This will open the **Create Period Structure** page.

**Create Period Structure**

Period Structure Name\*

Morning Begins\*

Afternoon Begins\*

---

No. of weeks

Week 1\*  Mon  Tue  Wed  Thu  Fri  Sat  Sun

Days in timetable cycle\*

---

Available From\*

Give your new structure a **Name**, which must be unique, for example 1 Week 6 Period.

Set the start time of the **Morning** and **Afternoon** sessions; this will be the time the first session of the morning and afternoon begin. This will usually be the **AM** and **PM Registration** sessions.

Set the number of weeks that will exist in your **Timetable Cycle** for example, a 10-day timetable cycle that runs Monday-Friday is a 2-week cycle (Monday to Friday week 1, followed by Monday to Friday week 2).

Once you have selected the number of weeks, you should put a tick in the boxes of the days that are part of the cycle to mark them as **Academic Days**.

**Create Period Structure**

Period Structure Name\*

Morning Begins\*

Afternoon Begins\*

---

No. of weeks

Week 1\*  Mon  Tue  Wed  Thu  Fri  Sat  Sun

Week 2\*  Mon  Tue  Wed  Thu  Fri  Sat  Sun

Days in timetable cycle\*

---

Available From\*

Enter the number of days in the **Timetable Cycle**

The **days in the timetable cycle** box should usually contain the number of **Academic Days** in your timetable cycle as defined above (e.g. **10** in the example above). It can sometimes be different so if you are unsure of what to put in this field then please contact the Helpdesk for advice.

**Available Date:** If you are performing your **End of Year** process before the start of your new **Academic Year** then just leave it as today's date (It will not affect the current **Academic Calendar**), as it will allow changes to be made. If a later date is used, you will not be able to see this model until the date entered. Click on the **Next** button.

Once you click on **Next**, this will open the **Timetable Day structure page** where you create the **Period Structure** of the day, including the AM position and duration, number of morning sessions, **PM** position and duration, **Lunches** and **Breaks** etc.

**Create Timetable Day Structure for Period Structure 22-23**

Save your day structure as you finalise each day. Save the model when it is complete

AM Register Period PM Register Period Non-Teaching Time

Day 1   Day 1

Day	Period Type	Start Time	Duration (min)
Day 1	<input type="checkbox"/> AM	08:45 <input type="button" value="⌄"/>	20
Day 2			
Day 3			
Day 4			
Day 5			



Click the **ADD** button to increase the number of available **Periods** – and use the **Period Type** dropdown menu to select the type of **Period BR, LU, AS, PS, AM, PM, or TP**.

**Note:** new **Periods** added will default to **TP (Teaching Period)**. You can edit the duration of each session and the times will adjust but please note that the **times must not overlap**.

Day	Period Type	Start Time	Duration (min)
Day 1	AM	08:45	20
Day 1	TP	09:05	60



#### RECOMMENDED!

Please define your **Breaks (BR)**, **Lunch (LU)**, **Pre-School (PS)** and **After School Sessions (AS)**. You will need them if you want to schedule detentions outside of normal teaching periods (e.g. after school) or you if want to timetable a teacher to do lunchtime duty.

Please remember to adhere to the **AM/PM or AM and PM Period** durations as well as the morning and afternoon session start times.

**If you take Statutory AM/PM Attendance to return to the DfE (e.g. Census), then you MUST have both AM and PM. Even if you don't physically take them, they must be in the system to record Statutory Attendance. If you are unsure about this, please contact the Bromcom Helpdesk.**

The checkbox to **Copy Settings to all days of the Timetable Cycle** is to save you having to set this up for each day where it is the same as **Day 1**. Tick this box and click on **SAVE** and the completed day is then copied to all the days in your **Timetable Cycle**.

If one day of the cycle is different e.g., you finish early on a Friday for Staff Meetings, then amend the appropriate days (Day 5 and 10 in this case as we have a 2 Week Timetable).

Day	Period Type	Start Time	Duration (min)	Period Name	Period Display Name
Day 1	AM	08:45	20	AM	AM
Day 2	TP	09:05	60	1	1
Day 3	TP	10:05	60	2	2
Day 4	BR	11:05	60	BR1	BR1
Day 5	TP	12:05	60	3	3
Day 6	LU	13:05	25	LU	LU
Day 7	PM	13:30	12	PM	PM
Day 8	TP	13:42	60	4	4
Day 9	TP	14:42	58	5	5
Day 10	AS	15:40	60	AS	AS

If the settings are incorrect, the system will display a warning in red, make the appropriate amendments and click the **Save** button again to complete the creation of your new **Period Structure**.

You will then be automatically returned to the **Period Structures Page**, where you can then edit the new **Period Structure** to re-name the **Periods** if required.

If you have made changes to the period structure then please check to ensure all the parameters under **Config>Attendance>Register Update Parameters** are still valid. For instance it would be difficult to update the PM register from Period 5 if your structure has changed such that there is no longer a Period 5.

## 2 Creating a New Academic Year

Your current **Academic Year** will expire on or around the end of August or beginning of September. To ensure that the system continues to run smoothly as you enter the new **Academic Year**, it is important that you define the new **Academic Year**.

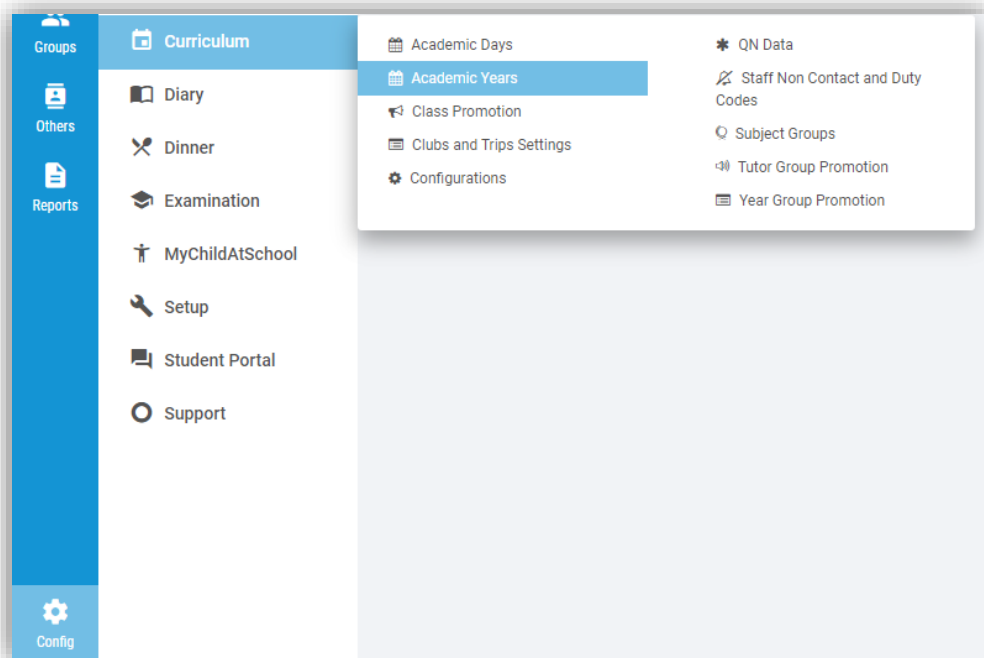
The system will automatically check for the end date on the current year and will automatically set the start date of the forthcoming year to **the day immediately following this date**. This is correct and don't worry if your first academic day is sometime after this as you will be able to set that later on.

The **End Date** of the current academic year may need changing. All Bromcom calendar weeks need to begin on a Sunday and end on a Saturday. This year the last Saturday in August is the 27th.

**Note** - It takes a while to re-save the entire **Calendar** and then display the term dates for the last term of that year.

To change the forthcoming year's **Start Date** you need to edit the current Academic Year **End Date**

Go to **Config>Curriculum>Academic Years**.



Ensure the current **Academic Year** is selected.

Academic Year

<NOT SELECTED>

<NOT SELECTED>

22/23

21/22

21/22

Save Cancel

Edit Academic Year

Start Date\* 29/08/2021 End Date\* 27/08/2022

Number of Terms\* 3

Terms	Name*	Start Date*	End Date*
1	Term 1	29/08/2021	01/01/2022
2	Term 2	02/01/2022	26/03/2022
3	Term 3	27/03/2022	27/08/2022

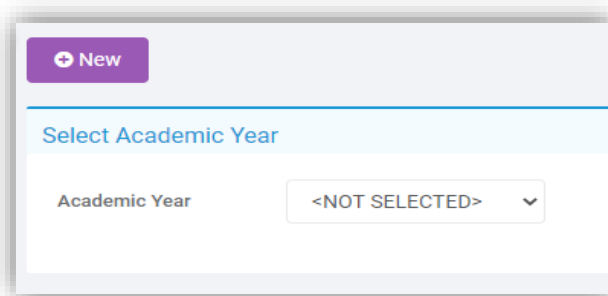
Following "Save" you are advised to check the status and timetable applied to any new academic days

The **End Date** must be a **Saturday**.

For example, if the new academic year starts on **Sunday 28<sup>th</sup> August 2022** then the **End Date** of the previous year can be no later than **Saturday 27<sup>th</sup> August 2022**.

Click **Save**.

To set up the new Academic Year, go to **Config>Curriculum>Academic Years**.



Click on the **New** button.

Now set the new **Academic Years'** end date to be the last Saturday of that **Academic Year**. For most customers, this would be Saturday 26<sup>th</sup> August 2023. Please see below for an example of how the 2022/23 year could look.

Select the number of terms from the dropdown list.

A screenshot of the 'Edit Academic Year' form. At the top left are 'Save' and 'Cancel' buttons. The form title is 'Edit Academic Year'. It shows 'Start Date\*' as 28/08/2022 and 'End Date\*' as 26/08/2023 with calendar icons. Below is 'Number of Terms\*' set to 3. A table lists three terms: Autumn (28/08/2022 to 31/12/2022), Spring (01/01/2023 to 01/04/2023), and Summer (02/04/2023 to 26/08/2023). A red note at the bottom says: 'Following "Save" you are advised to check the status and timetable applied to any new academic days'.

We **highly** recommend that you include the different holidays in your terms and use the **Academic Days** page to mark those holidays as the relevant day status.

For each term fill in the **Term Name**, **Start date** and **End date**. These must follow the logic of: **Sunday = Start date** and **Saturday = End date**. The system will warn you if you have not adhered to this format.

Do not worry if your first **Academic Day** (the date the students start) or end of terms do not adhere to these dates completely, you will get the chance to add finer detail in the next stages.

Period Structure

Colour Code

Timetable Day for first week day of Term 1

TT Week N/A

Now select the **Period Structure** that you are using from the dropdown list. If you have defined a new **Period Structure** in **Step 1** of the **End of Year process**, then select this as the new change to structure, otherwise you can choose the structure from the current year. In this example we have chosen the 'Current' **Period Structure**.

You can (if you wish) change the colour associated with the **Academic Year**, which will change the text colour on the **Academic Days** screen, by selecting the **Colour Code** button.

Finally, when picking the **Timetable day for first weekday of Term 1** always select **1** as this value determines what day in the week the **Day 1** will be, for example if **2** is selected here Tuesday will be **Day 1**.

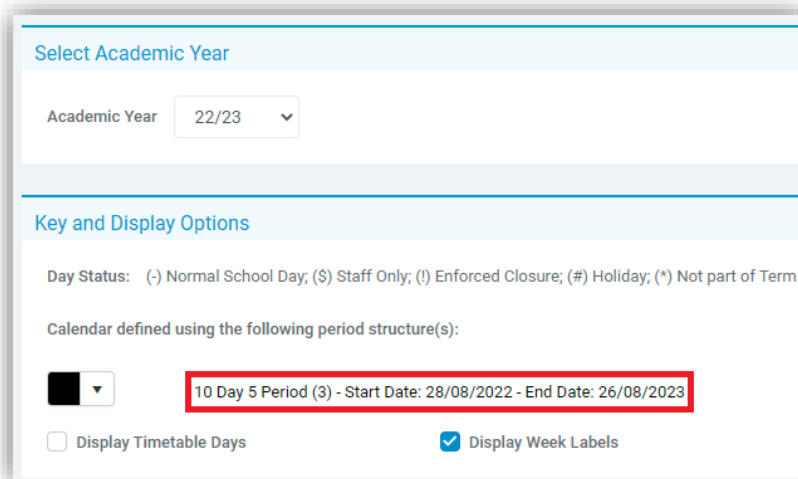
Review your settings and then click on the **Save** button.

The **Save** process may take a few minutes to create all the calendar entries for the year.

You have now created the **New Academic Year**.

All **Days** in these new **Terms** are currently set to **Academic Days** which now need to be edited and the relevant weeks put in as **Holidays** and **Staff Only** days. When the **Save** process from **Creating the Academic Year** completes you will need to go to **Config>Curriculum>Academic Days**.

The **Period Structure** name you have chosen for **2022/23** will be displayed **here**.



Select Academic Year

Academic Year: 22/23

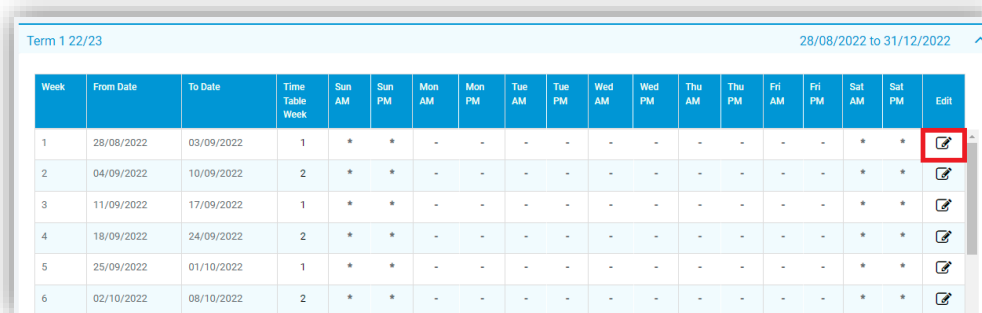
Key and Display Options

Day Status: (-) Normal School Day; (\$) Staff Only; (!) Enforced Closure; (#) Holiday; (\*) Not part of Term

Calendar defined using the following period structure(s):

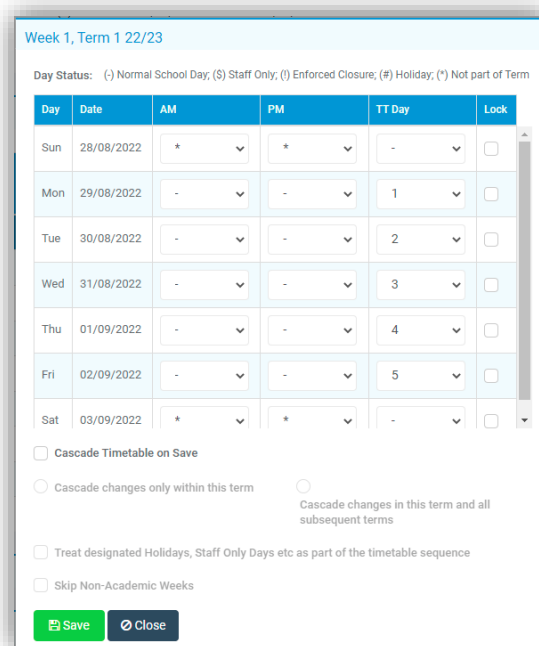
10 Day 5 Period (3) - Start Date: 28/08/2022 - End Date: 26/08/2023

Display Timetable Days  Display Week Labels



Week	From Date	To Date	Time Table Week	Sun AM	Sun PM	Mon AM	Mon PM	Tue AM	Tue PM	Wed AM	Wed PM	Thu AM	Thu PM	Fri AM	Fri PM	Sat AM	Sat PM	Edit
1	28/08/2022	03/09/2022	1	*	*	-	-	-	-	-	-	-	-	-	-	*	*	
2	04/09/2022	10/09/2022	2	*	*	-	-	-	-	-	-	-	-	-	-	*	*	
3	11/09/2022	17/09/2022	1	*	*	-	-	-	-	-	-	-	-	-	-	*	*	
4	18/09/2022	24/09/2022	2	*	*	-	-	-	-	-	-	-	-	-	-	*	*	
5	25/09/2022	01/10/2022	1	*	*	-	-	-	-	-	-	-	-	-	-	*	*	
6	02/10/2022	08/10/2022	2	*	*	-	-	-	-	-	-	-	-	-	-	*	*	

Open each week, by clicking the edit button on the **right of the screen** and set the individual day's details. This includes staff only days, school holidays and public holidays.



Week 1, Term 1 22/23

Day Status: (-) Normal School Day; (\$) Staff Only; (!) Enforced Closure; (#) Holiday; (\*) Not part of Term

Day	Date	AM	PM	TT Day	Lock
Sun	28/08/2022	*	*	-	<input type="checkbox"/>
Mon	29/08/2022	-	-	1	<input type="checkbox"/>
Tue	30/08/2022	-	-	2	<input type="checkbox"/>
Wed	31/08/2022	-	-	3	<input type="checkbox"/>
Thu	01/09/2022	-	-	4	<input type="checkbox"/>
Fri	02/09/2022	-	-	5	<input type="checkbox"/>
Sat	03/09/2022	*	*	-	<input type="checkbox"/>

Cascade Timetable on Save

Cascade changes only within this term  Cascade changes in this term and all subsequent terms

Treat designated Holidays, Staff Only Days etc as part of the timetable sequence

Skip Non-Academic Weeks

In some Local Authorities the attendance teams are no longer accepting \$ (our 'Staff Only' symbol) in Student Attendance Certificates. If you are unsure which code to use, consult with your Local Authority.

Also set any deviation from the expected **Timetable Day Cycle**. Normally the cycle will be a logical numeric progression (1, 2, 3, 4, etc...) but there may be deviations from this that need to be accounted for. If they exist, then simply select the week containing the adjustment and change the value in the dropdown against that day (you can view **Timetable Days** by clicking the **Display Timetable Days** option).

Generally, Days 1-5 are Week 1, Days 6-10 are Week 2.

Cascade Timetable on Save would be used in a scenario where you change Academic days to half term and then cascade for example, meaning that the weeks that follow update to the correct timetable weeks. It essentially causes a ripple effect where the weeks after you cascade update to follow your desired sequence.

**Tip:** If you are amending your Academic Days or have used Cascade Timetable on Save, tick **Display Timetable Days** to view/ensure that your Academic Days are correct (Days 1-5 are in Week 1 and Days 6-10 are in Week 2).

Week	From Date	To Date	Time Table Week	Sun AM	Sun PM	Mon AM	Mon PM	Tue AM	Tue PM	Wed AM	Wed PM	Thu AM	Thu PM	Fri AM	Fri PM	Sat AM	Sat PM	Edit				
1	29/08/2021	04/09/2021	1	*	*	#	#	#	#	-	-	Day 3	-	-	Day 4	-	-	Day 5	*	*		
2	05/09/2021	11/09/2021	2	*	*	-	-	Day 6	-	-	Day 7	-	-	Day 8	-	-	Day 9	-	-	Day 10	*	*
3	12/09/2021	18/09/2021	1	*	*	-	-	Day 1	-	-	Day 2	-	-	Day 3	-	-	Day 4	-	-	Day 5	*	*
4	19/09/2021	25/09/2021	2	*	*	-	-	Day 6	-	-	Day 7	-	-	Day 8	-	-	Day 9	-	-	Day 10	*	*
5	26/09/2021	02/10/2021	1	*	*	-	-	Day 1	-	-	Day 2	-	-	Day 3	-	-	Day 4	-	-	Day 5	*	*
6	03/10/2021	09/10/2021	2	*	*	-	-	Day 6	-	-	Day 7	-	-	Day 8	-	-	Day 9	-	-	Day 10	*	*

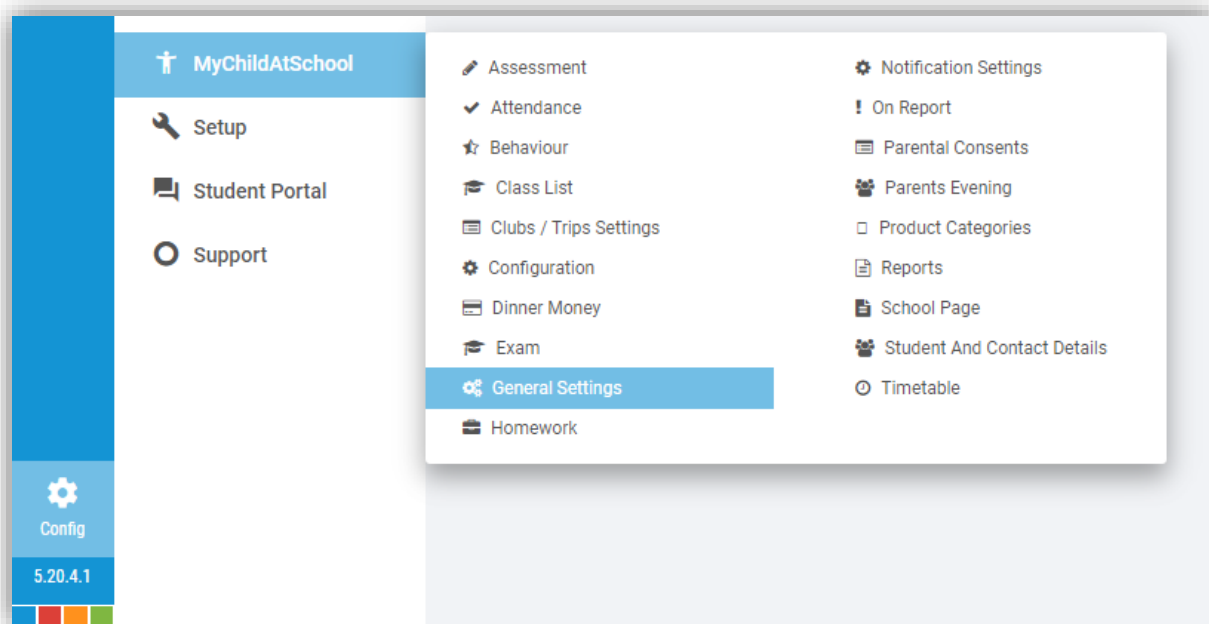
If you have a multi-week timetable, it is **critical** to ensure that the week numberings are correct. This is to ensure your timetable is consistent for the rest of the coming year. Check the timetable days are correct by clicking the appropriate week number after each half term/new term. Please see a screenshot from last year showing the multi-week timetable;

Week	From Date	To Date	Time Table Week	Sun AM	Sun PM	Mon AM	Mon PM	Tue AM	Tue PM	Wed AM	Wed PM	Thu AM	Thu PM	Fri AM	Fri PM	Sat AM	Sat PM	Edit
1	28/08/2022	03/09/2022	1	*	*	-	-	-	-	-	-	-	-	-	-	*	*	Edit
2	04/09/2022	10/09/2022	2	*	*	-	-	-	-	-	-	-	-	-	-	*	*	Edit
3	11/09/2022	17/09/2022	1	*	*	-	-	-	-	-	-	-	-	-	-	*	*	Edit
4	18/09/2022	24/09/2022	2	*	*	-	-	-	-	-	-	-	-	-	-	*	*	Edit

Once you have set the specific day details for each term then you have completed the **Academic Year** setup.



If you use **MyChildAtSchool**, go to **Config>MyChildAtSchool>General Settings**.



Once on this page, you need to ensure the new **Academic Year** will be visible to parents.

Academic year data to display in MCAS  
Select which years you wish MCAS users to have access to (Default is set to ALL) If Academic Year has not been selected on User Defined section, system will automatically set ALL option

All  User Defined

12/13  13/14  14/15  15/16  16/17  17/18  18/19  19/20  20/21  21/22  22/23

Days of the week to display in MCAS (Attendance and Timetable)

Monday  
 Tuesday  
 Wednesday  
 Thursday  
 Friday  
 Saturday  
 Sunday

If you have **All** selected, then you do not need to do anything here.

If you have the **User Defined** option selected, then ensure the new **2022/23 Academic Year** and any previous **Academic Years** that are to be displayed are ticked.

You can then click on **Save**.

### 3 Altering Attendance Codes



Do not change your Attendance Codes if you are adhering to your Education Authorities approved list of set Attendance Codes

To make any amendments or to create new **Attendance Codes**, go to **Config>Attendance>Attendance Codes** and set the **Academic Year** dropdown to **22/23**.

**+ New** **Edit**

Attendance Codes

Academic Year: 21/22 (dropdown menu open showing 22/23 selected)

Grid actions: CSV Pdf Print

Mark	Mark	Mark Description	Active Subcodes	Physically Present	Protected Mark	Enable for Teacher Registers	Display Colour	Active	Export Mark
	Cancelled	Cancelled	0	No	No	Yes	Orange	Yes	
#	School Closure (C)	Planned whole or partial school closure - not counted in possible attendances	0	No	No	No		Yes	
/	Present (P)	Present	0	Yes	Yes	Yes	Green	Yes	
?	Precreated (?)	Precreation Mark	0	No	No	Yes		Yes	
A	No Kit (P)	No Pe Kit	0	No	No	No		Yes	

Select the **New** button if you want to create a fresh **Attendance Code**.

**New Attendance Code**

Mark: A (dropdown)

Physically Present     Protected Mark     Include in Teacher Register

Mark Name:

Mark Description:

Display Colour:    Meaning: Present (dropdown)

Late Before Reg. Closed (Minute Prompt)

Late After Reg. Closed     Generate Absence Slip

Present Key Mark     Absent Key Mark

Export Mark:     Import Mark:

**Create** **Cancel**

Otherwise click the **Edit** icon to make changes to an existing **Code**.

## 4 Setting Registration Update Parameters



This step is required for all schools where students do not attend AM and/or PM registration and therefore need marks from teaching periods to write back into the AM/PM Sessions.

If this step is not completed, none of the expected automatic updates of AM/PM attendance from other periods will occur. Therefore, it is imperative that it is finished in its entirety.

Go to **Config>Attendance>Register Update Parameters**.

Change the **Single Date** radio button to the **Multiple Date** radio button>Set your **Academic Start** to the first day the **Students** are in school and **Academic End** to the last date the **Students** are in school. In this example a 2-week timetable is shown by the Week 1 and Week 2.

Save Last Available Settings

Please enter parameters

Single Date  Multiple Dates

Academic Start\* 29/08/2022 Academic End\* 31/07/2023

Week 1  Monday  Tuesday  Wednesday  Thursday  Friday

Week 2  Monday  Tuesday  Wednesday  Thursday  Friday

Select the relevant options for your **Register Update Parameters**.

Use AM Register  Use PM Register  Use Period Register

Daily Update Parameters

Update Register Headers  None  AM/PM Only  All

Use Lesson Times to Update Lesson Times Threshold 0

Only Update Missing Marks

Update Unauthorised Marks To Authorised Marks

Update All Unauthorised Marks

Update Mirror Marks for All Types of AM/PM

Update AM Registers from Periods

Min AM Period to Update 1 Late AM Period Before Reg. Closed 1

Max AM Period to Update 1 Late AM Period After Reg. Closed N/A

Mirror AM

Update PM Registers from Periods

Min PM Period to Update 4 Late PM Period Before Reg. Closed 4

Max PM Period to Update 4 Late PM Period After Reg. Closed N/A

Mirror PM

If your forthcoming year's structure closely resembles the current year's structure, simply click on the **Last Available Settings** button at the top left of the screen and then click on **Save**.

The screenshot shows a configuration interface with the following elements:

- Buttons: **Save** (green) and **Last Available Settings** (blue, highlighted with a red border).
- Section: **Please enter parameters**
- Radio buttons:  Single Date,  Multiple Dates
- Academic Start\*: 29/08/2022 (with a calendar icon)
- Academic End\*: 31/07/2023 (with a calendar icon)
- Week 1:  Monday,  Tuesday,  Wednesday,  Thursday,  Friday
- Week 2:  Monday,  Tuesday,  Wednesday,  Thursday,  Friday

If you are changing the **Period/Time Structure** for the new **Academic Year**, then this screen will require careful configuration. To this end it is recommended that you contact the Helpdesk to assist you in configuring these additional options.

Please ignore the **Warning: Inconsistent data found in database** message. This will disappear once you have setup the parameters for the new **Academic Year** but if it does not, please contact the Helpdesk.

Once you are happy with any changes you have made, click on the **Save** button.

**Please contact the Helpdesk if you are unsure of anything at this point.**

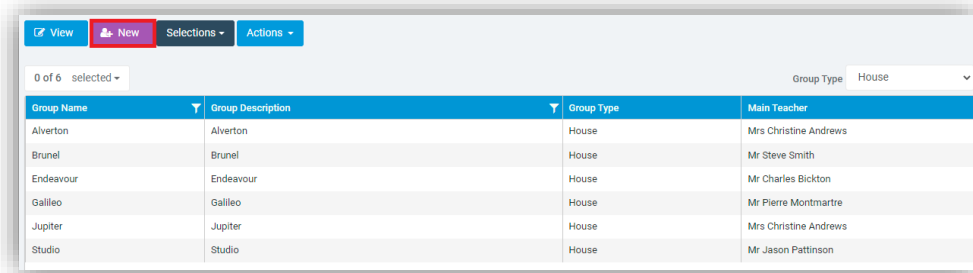
## 5 Maintenance of Curriculum Entities

This is where you would change any setups of your **Curriculum** information such as **Year Groups, Subjects, Departments, Faculties, Houses, Learning Aims** etc.

If you are not making changes to these settings then you can skip to the next section, otherwise please read on.

**Houses** – if you are introducing a **House** system or changing the way it is organised, go to **Groups>Group Type>House**.

To create a new **House** with a start date of the beginning of the new **Academic Year** click on the **New** button.



The screenshot shows a web interface for managing groups. At the top, there are buttons for 'View', 'New', 'Selections', and 'Actions'. Below these is a table with columns: Group Name, Group Description, Group Type, and Main Teacher. The table lists six existing houses: Alverton, Brunel, Endeavour, Galileo, Jupiter, and Studio, each with its respective main teacher.

Group Name	Group Description	Group Type	Main Teacher
Alverton	Alverton	House	Mrs Christine Andrews
Brunel	Brunel	House	Mr Steve Smith
Endeavour	Endeavour	House	Mr Charles Bickton
Galileo	Galileo	House	Mr Pierre Montmartre
Jupiter	Jupiter	House	Mrs Christine Andrews
Studio	Studio	House	Mr Jason Pattinson

### Create New Group

Group to create:

House Name\*

Description\*

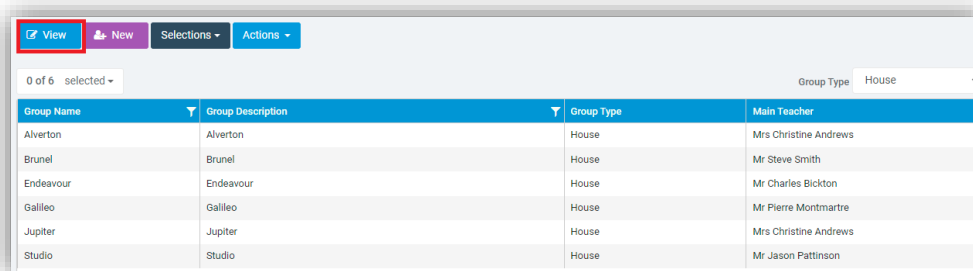
Start Date\*

End Date

House Colour

Enter the new **House** details and click on the **Save** button.

To edit the existing **Houses**, select the **Houses** and click on the **View** button.



This screenshot is identical to the one above, but the 'View' button in the top navigation bar is highlighted with a red box, indicating that the user should click it to edit an existing house.

**Subjects, Departments and Faculties** will normally continue through from year to year.

If any are not in use for the next year, they can be edited by pressing **View** and entering an **End Date** within the **Basic Details** Panel. Memberships of **Staff** and **Subjects to Departments**, and **Departments to Faculties** can also be amended to reflect the situation for next year otherwise they continue through unchanged so long as there are no end dates applied e.g., if a member of staff leaves and this sets an end date to all their memberships.

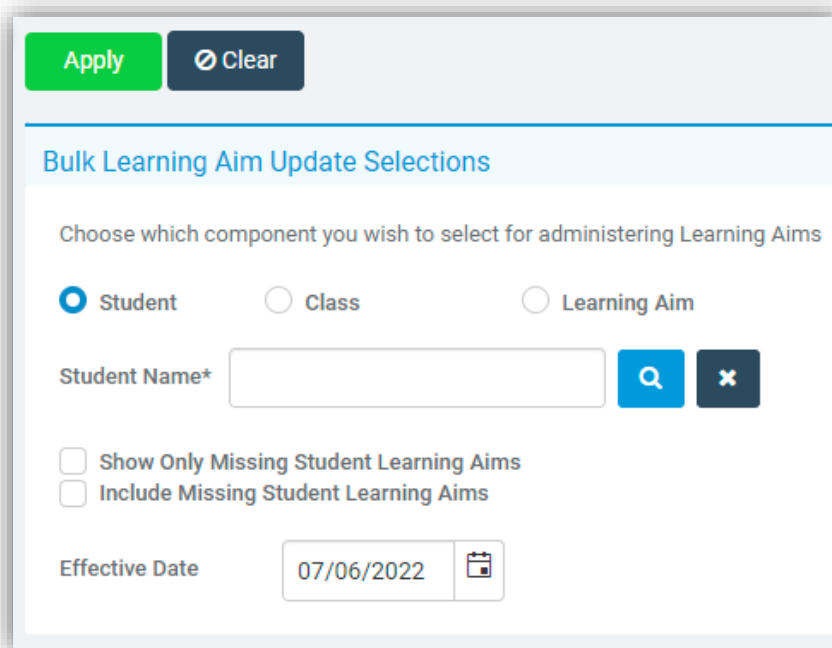
**We advise that you do not DELETE any group, please end date them instead.**

Add any **New** items as required with a start date of the beginning of the new **Academic Year**.

In all instances, please remember to double check any entered **Start** or **End** dates to ensure that they correctly match the appropriate dates from either the **Current Year** (in the case of items being ended) or the forthcoming **Academic Year** (in the case of new items being added).

**Student Learning Aims** that are continuing from the **Current Academic Year** to the new **Academic Year** can be left alone as they will continue with the **Student** into the new **Academic Year**.

If a **Course** is ending, then the related **Student Learning Aims** also need to be ended. This can be done through **Modules>Curriculum>Bulk Learning Aim Update**.



The screenshot shows a web form titled "Bulk Learning Aim Update Selections". At the top, there are two buttons: "Apply" (green) and "Clear" (dark blue). Below the title, there is a heading "Choose which component you wish to select for administering Learning Aims". There are three radio button options: "Student" (selected), "Class", and "Learning Aim". Below these is a search field labeled "Student Name\*" with a search icon and a clear icon. There are two checkboxes: "Show Only Missing Student Learning Aims" and "Include Missing Student Learning Aims". At the bottom, there is an "Effective Date" field with the date "07/06/2022" and a calendar icon.

You can select to update the **Learning Aims** by **Student, Class, or Learning Aim**. Once you have made your selection, simply click on the **Apply** button and this will take you to the next stage of the process.

On the next page you will see all the **Students** selected with All of their related **Learning Aims**.

Save Back Add / Remove Columns

Student Learning Aims

Add Learning Aim Remove Apply 17/07/2020 Completed

Last Name	First Name	Class	QN	Start Date	End Date	Planned End Date	Exclude	Protect	Core	Trainee	Withdrawal Reason	Third P
Antonio	Harriett		10019777	01/09/2019	17/07/2020	31/07/2020	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<NO

Completed  
 <NOT SELECTED>  
 Continuing  
 Completed  
 Withdrawn  
 Transferred

Click on the **Save** button.

You will need to repeat this process for any **Learning Aims** that need to have a different **Status** or different **End Date** applied. If you have any problems with this process, please contact the Helpdesk.

If you use **Behaviour**, please continue to the next section. Otherwise, please proceed to **Section 7 - Promoting the Tutor Groups**.

## 6 Behaviour

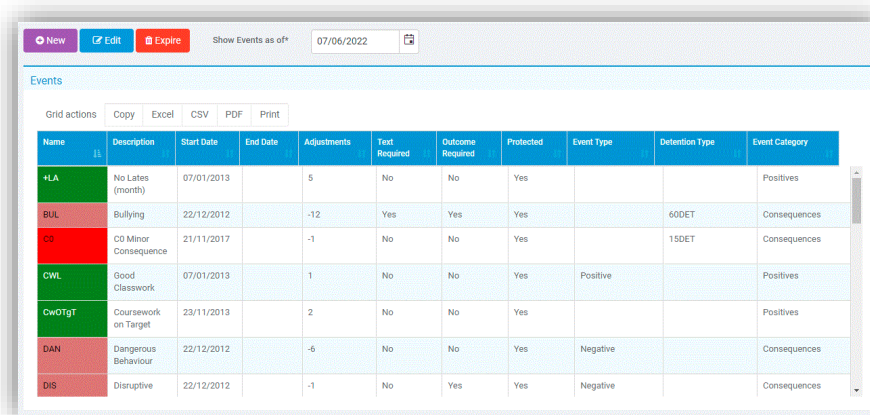
If your **Behaviour** setup requires changing for the forthcoming **Academic Year** or the **Student Point Totals** are to be reset before the start of the new term, then you will need to complete this section.

Reconfiguration of Behaviour is only required if you use Behaviour and you **ARE** changing your Behaviour setup in the forthcoming year (this includes removing or adding new Events or Actions)

Any **Behaviour Events/Actions** that will not be used in the forthcoming **Academic Year** should be expired. This is done in the **Behaviour** module.

For **Behaviour Actions** go to **Config>Behaviour>Actions** and for **Events** go to **Config>Behaviour>Events**.

Select the **Actions** or **Events** to that are no longer to be used and click the **Expire** button.



Name	Description	Start Date	End Date	Adjustments	Text Required	Outcome Required	Protected	Event Type	Detention Type	Event Category
HLA	No Lates (month)	07/01/2013		5	No	No	Yes			Positives
BUL	Bullying	22/12/2012		-12	Yes	Yes	Yes		60DET	Consequences
CO	CO Minor Consequence	21/11/2017		-1	No	No	Yes		15DET	Consequences
CWL	Good Classwork	07/01/2013		1	No	No	Yes	Positive		Positives
CwOTgt	Coursework on Target	23/11/2013		2	No	No	Yes			Positives
DAN	Dangerous Behaviour	22/12/2012		-6	No	No	Yes	Negative		Consequences
DIS	Disruptive	22/12/2012		-1	No	Yes	Yes	Negative		Consequences

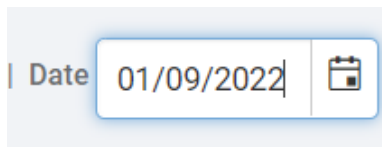
Expiring an **Event** or **Action** only removes it from the system from that date onwards. Historically it will still be available and prior instances where they were used will still be retained.

Any new **Events, Actions** or **Outcomes** need to be created in the MIS via the **Behaviour** module before you can use them in **Behaviour Pathways**.



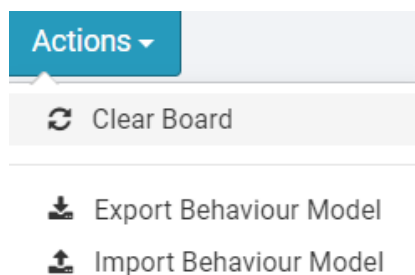
If you are setting up a **New Behaviour Model in Pathways** that is different to your current **Model** go to **Config>Behaviour>Pathways**.

Select the required future **Date** for the new model on the **top of the screen**.



Then click **Save**

If you are creating a **new Model**, use the **Actions** drop down and choose **Clear Board**.



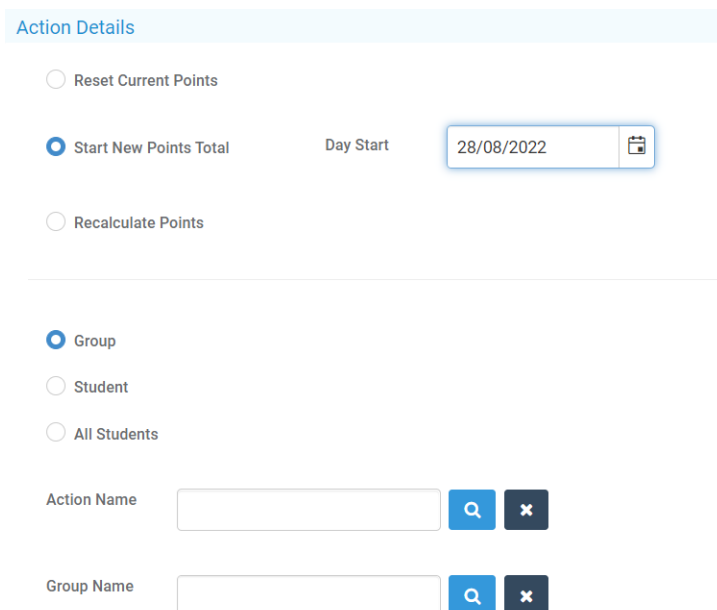
You will need to do this for each **Category** that requires amending.

After this, simply setup the new **Behaviour Pathways** following the normal instructions.



Starting new points totals is extremely important; If not completed, then all of next year's points will simply be added to the current year's point's totals

To change the **Student Points Totals**, go to **Modules>Behaviour>Reset Student Actions**.



Select **Start New Points Total** option.

Enter the **Day Start** date to start the new totals from (most likely the first Sunday of the new **Academic Year**).

If you want to apply **New Points Totals** to **all Students** and Actions, select the **All-Students** option, and click on **Apply**.

If you **are not** resetting the **Points** Totals for **all Students** and **all Actions**, then do the following:

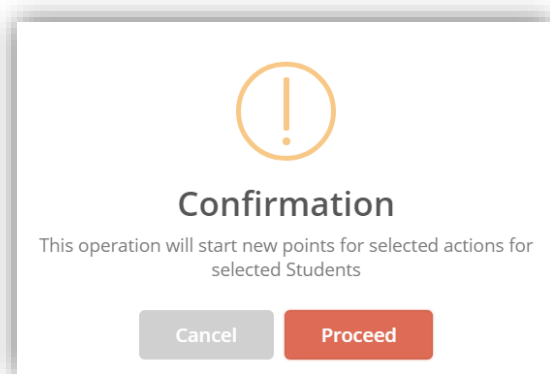
Select the **Students** you want to start new point totals for by selecting either **Student** or **Group** and select the **Students** or **Groups** you wish to **Start New Points Total** for.

Select the **Actions** you are starting new **Points Totals** for.

Confirm the action list is correct.

Action Details	
<input type="radio"/> Reset Current Points	
<input checked="" type="radio"/> Start New Points Total	Day Start: 28/08/2022
<input type="radio"/> Recalculate Points	
<hr/>	
<input type="radio"/> Group	
<input type="radio"/> Student	
<input checked="" type="radio"/> All Students	
Action Name: <input type="text"/>	<input type="button" value="Search"/> <input type="button" value="Refresh"/> <input type="button" value="Delete"/>
<hr/>	
Selection List <input type="button" value="Print"/> <input type="button" value="Close"/>	
12 action(s) selected	
15MinDet	x
30MinDet	x
60MinDet	x
90MinDet	x
BRZ	x
BRZ	x
GLD	x
GLD	x
Minus5	x
PI	x
SIL	x
SIL	x

Click **Apply**. You will get a warning message prompt. Click the **Proceed** button to continue.



We recommend that you also review/update your **Detention Schedules** for each of your **Detention Types**, especially if you have changed your **Period Structure** for the new Academic Year.

Guidance on setting up **Detention Schedules** can be found from the following area of our Help Centre:

<https://docs.bromcom.com/knowledge-base/how-to-create-a-new-detention-schedule/>

**If you have changed your Period Structure for next Academic Year, you will need to first setup a Data Boundary for 2022/23 exclusively via Config>Setup>Data Boundaries.**

The screenshot shows two side-by-side panels. The left panel, titled 'Data Boundaries Maintenance', features a table with columns for 'Description', 'Start Date', and 'End Date'. The table lists various year ranges from 15-16 to 21-22, plus a 'Nucleus' entry. Above the table are buttons for 'Grid actions', 'Copy', 'Excel', 'CSV', 'PDF', and 'Print'. The right panel, titled 'Create New Data Boundary', has a 'Description\*' field containing '22-23'. It includes 'Start Date\*' and 'End Date' fields, both set to '28/08/20...'. Below these fields is a section for selecting user roles, with a list of roles and checkboxes. The 'Administrator' role is selected.

Description	Start Date	End Date
15-16	30/08/2015	27/08/2016
16-17	28/08/2016	26/08/2017
17-18	27/08/2017	25/08/2018
18-19	26/08/2018	31/08/2019
19-20	02/09/2019	30/08/2020
20-21	30/08/2020	29/08/2021
21-22	29/08/2020	30/08/2021
Nucleus	01/01/1993	

**Create New Data Boundary**

Description\* 22-23

Start Date\* 28/08/20... End Date 26/08/2021

Please select the user role(s) to be assigned to the selected data boundary

- Admin - P
- Administrator
- Admissions
- Attendance Officer
- Attendance Wembley
- Basic
- Behaviour Administrator
- Contact
- Cover
- Cover Admin 2
- Curriculum
- DATA manager
- Data User
- Office +
- Office + Census
- Office - JR
- Office X SWF
- Personnel
- Safeguarding
- Safeguarding Lead
- Safeguarding User
- SMT
- Supply Teacher
- Support Officer
- Teacher
- Teacher Assistant

Once you have setup the **Data Boundary** for 2022/23, you must associate this to your **user account** via **My Account>General>Current Interval**.

The screenshot shows the 'General' settings page. It includes a 'User Access Key' field with the value 'E1B46F7E-EAF1-4ACD-B1DF-59047028CBAf'. Below this is a 'QR Code to link Teacher App' with a QR code and a refresh icon. A note states 'Note: QR Code is valid until 19/05/2022 17:09'. The 'Default Language' is set to 'English (United Kingdom)'. The 'Current Interval' is set to 'Nucleus' with a dropdown menu open showing options from '15-16' to '22-23'. The 'Selection Component Page Size' has 'Max Limit' selected. The 'Projector Mode Login State' is set to 'Last State'.

**General**

User Access Key: E1B46F7E-EAF1-4ACD-B1DF-59047028CBAf

QR Code to link Teacher App:

Note: QR Code is valid until 19/05/2022 17:09

Default Language: English (United Kingdom)

Current Interval: Nucleus (From 01/01/1993)

Selection Component Page Size: Max Limit

Projector Mode Login State: Last State

**Behaviour**

## 7 Promoting Year Groups

Before we do any form of **Promotion** for the **Year Groups** we need to ensure that each **Year Group** has a **Next Year Group** linked to it. This can be done by going to **Groups>Group Type>Year Group>select your Year Groups>View >look in the Additional Group Details** section and make sure that **Next Year Group** has the correct **Year Group** selected. Once you have entered the next **Year Group** you will be able to press **Save** and then click on the **Next** button to take you to the next **Year Group**.

If your **Year Groups** already have the next **Year Group** entered, please skip this stage.

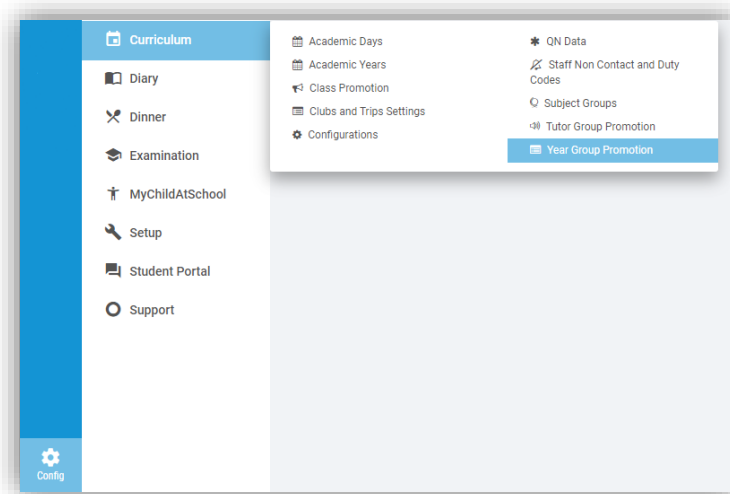
The screenshot shows a web form with two main sections: 'Basic Group Details' and 'Additional Group Details'. In the 'Basic Group Details' section, there are input fields for 'Name\*' (containing '07'), 'Description\*' (containing '07'), 'Start Date\*' (containing '03/09/2012'), and 'End Date\*'. Below these fields is a red note: 'Please contact Bromcom Support if you would like to deactivate this year group.' The 'Additional Group Details' section contains two dropdown menus: 'NC Year Group' (set to 'Year 7') and 'Next Year Group' (set to '08'). A red rectangular box highlights the 'Next Year Group' dropdown menu.

Year Groups continue so don't worry about the start and end dates. The start date will be when the system was first set up in your school and the **end date should always be left blank**.

Please see the table below for guidance on how to set your **Current** and **Next Year Groups**. If you have **Year Groups** outside of this list and are not sure what the **Next Year Group** should be, please contact the **Helpdesk**. Year 13 will have a **Next Year Group** of 13.

Current NC year	Current NC Year Name	Next Year Group
7	Year 7	8
8	Year 8	9
9	Year 9	10
10	Year 10	11
11	Year 11	12
12	Year 12	13
13	Year 13	13 (13 must have a Next Year Group in secondary schools)
?	<NOT SELECTED>	?

When you are ready to **Promote** all your **Year Groups**, go to **Config>Curriculum>Year Group Promotion**.



The **Year Group Promotion** page will then be displayed.

Default year to **Promote from** is the current year or last year if you are doing this in September.

There are **two options** on the following dropdown menu:

1. **Add to any existing Memberships** preserves any that may have been added to the next year's **Year Group** by another means for example a new student added to the system who is joining that year at the start of September.
2. **Overwrite all existing memberships** if you make a mistake and need to clear it.

There are two additional checkboxes, tick these if you wish to:

**Create Bands** matching those in the **Current Year**, including **Memberships**.

**Include Staff memberships e.g. Head of Years**, where **Head of Years** are moving up with the **Year Group**. Otherwise, their association with the **Year Group** ends at the end of the **Academic Year**.

Finally, the **Active On** selector allows you to pick the date from which **Year Group** memberships will be taken. In this case, it will take all students **Active On 20/05/2022** and **Promote** them to the next **Year Group** up into the **Academic Year 2022/23**.

Clicking on the **OK** button will **Promote ALL** of your **Year Groups**.

## 8 Promoting Tutor Groups

You do not need to promote **Mixed/Vertical Tutor Groups**, the Groups can remain unchanged without an End Date.

You would just need to amend the Student Memberships within the Groups by viewing the Tutor Group on the Groups Page, going to Memberships section and end dating the current 21/22 Student Memberships before using Add Multiple to add the new 22/23 Student Memberships.

To **Promote Tutor Groups** go to **Config>Curriculum>Tutor Group Promotion** and select the **Tutor Groups** to be **Promoted** and click the **Go** button.

The screenshot shows the 'Tutor Group Linkages' section of the system. At the top, there are three buttons: 'Promote' (with a left arrow), 'Save' (with a floppy disk icon), and 'Back' (with a circular arrow icon). Below this is the title 'Tutor Group Linkages'. A note states: 'You can use Generate button to get an assumption for the next collection name'. To the right of this note are two buttons: 'Generate' and 'Clear' (with a trash icon), and a dropdown menu currently set to '<NOT SELECTED>'. Below this is a table with the following columns: a checkbox, 'Year Group', 'Band', 'Tutor Group Name', 'Next Tutor Group', and 'Next Band'. The table contains four rows of data:

<input type="checkbox"/>	Year Group	Band	Tutor Group Name	Next Tutor Group	Next Band
<input type="checkbox"/>	07	07A	07A	08A	<NOT SELECTED>
<input type="checkbox"/>	07	08A	07B	08B	<NOT SELECTED>
<input type="checkbox"/>	08	07A	08A	9A	<NOT SELECTED>
<input type="checkbox"/>	08	08A	08B	9B	<NOT SELECTED>

Then select the **Tutor Groups** you wish the system to **Generate** a suggested name for.

This screenshot shows the same interface as above, but with the first row selected. The checkbox in the first row is now checked. The 'Next Tutor Group' field for the first row has been updated to '8A'. The 'Generate' and 'Clear' buttons and the dropdown menu remain the same.

<input checked="" type="checkbox"/>	Year Group	Band	Tutor Group Name	Next Tutor Group	Next Band
<input checked="" type="checkbox"/>	07		07A	8A	<NOT SELECTED>
<input type="checkbox"/>	10		10A		<NOT SELECTED>
<input type="checkbox"/>	10		10B		<NOT SELECTED>
<input type="checkbox"/>	11		11A		<NOT SELECTED>
<input type="checkbox"/>	11		11B		<NOT SELECTED>
<input type="checkbox"/>	12		12A		<NOT SELECTED>
<input type="checkbox"/>	12		12B		<NOT SELECTED>

Click on the **Generate** button for the system to suggest a name for the **Next Tutor Group** alternatively type in the new name. The changes can either be saved by clicking on the **Save** button and promoted later, allowing changes to be made first or move straight to the next step and click **Promote** to continue.

#### Tutor Group Linkages

You can use **Generate** button to get an assumption for the next collection name

Generate

Clear

<NOT SELECTED>

✓	Year Group	Band	Tutor Group Name	Next Tutor Group	Next Band
	07		07A	8A	<NOT SELECTED>
	10		10A	11A	<NOT SELECTED>
	10		10B	11B	<NOT SELECTED>
	11		11A	12A	<NOT SELECTED>
	11		11B	12B	<NOT SELECTED>
	12		12A	13A	<NOT SELECTED>
	12		12B	13B	<NOT SELECTED>

Go

Reset

#### Tutor Group Promotion

Select the Academic year which you want to promote the Tutor Groups to and the date they should start

Promote To

22/23

Start Date\*

28/08/2022

End Date

26/08/2023

The latest membership of each group will be promoted to the corresponding new group.

This will transfer the current membership, where the group is still in use, or the membership as it stood on the group's end date, where the group is no longer active.

Add to any existing memberships

Overwrite all existing memberships

Student memberships are included by default, select others as required below:

- Maintain House Memberships linked to former Tutor Group
- Include Staff Memberships e.g. Main Teacher and any Assistants
- Include Room(s)

	Year Group	Band	Tutor Group Name	Next Tutor Group	Next Band
⊖	07		07A	8A	
⊖	10		10A	11A	
⊖	10		10B	11B	
⊖	11		11A	12A	
⊖	11		11B	12B	
⊖	12		12A	13A	
⊖	12		12B	13B	
⊖	08		8A	9A	

You can choose to exclude any of the **Groups** by deleting them from the list using the **red** remove button.

Select the **Academic Year** you will **Promote to** from the dropdown list and the appropriate **Start Date** and **End Date**.

As with **Year Groups** you can **add to existing memberships** (default for safety) or **overwrite** (if promoting to pre-existing **Tutor Groups** please be aware that the overwrite feature will remove all current memberships).

Other memberships can be passed on as well:

- **Houses** (ticked by default)
- **Staff** (not ticked by default)
- **Rooms** (not ticked by default)

Clicking on the **Go** button will create the new **Groups** based on the ones they were linked to and the old **Group Memberships** are ended for the end of the current **Academic Year** (if they do not already have an end date).

**Hint:** If you want to merge two Tutor Groups e.g. 11A1 and 11A2 become 12A in the Sixth Form, you cannot promote both to the same new group name initially (for safety reasons duplicate names are not allowed in the same promotion round). Promote one group first and then add the other group to the same new Tutor Group name a second time around.



## 9 Promoting Classes

Go to **Config>Curriculum>Class Promotion**, select the **Classes** to be **Promoted** and click on the **Go** button.

✓	Year Group	Band	Class Name	Next Class	Next Band
	09		Ar9/A1	10Ar9/A1	<NOT SELECTED>
	09		Ar9/B1	10Ar9/B1	<NOT SELECTED>
	09		EN9/A1	10EN9/A1	<NOT SELECTED>
	09		EN9/B1	10EN9/B1	<NOT SELECTED>

Select **the classes in the list** and click on the **Generate** button for the system to suggest a name for the next **Class** alternatively type in the new name. The changes can either be saved by clicking on the **Save** button and promoted later, allowing changes to be made first or move straight to the next step and click **Promote** to continue.

**Important:** If you have imported a timetable, it is crucial to **enter the new class names exactly as they appear in the timetable**. This ensures that the wizard promotes the students in to the classes that have already been created by the timetable, rather than creating more classes and promoting students in to them incorrectly.

There is no option to include **House Membership** this time, just **Staff** and **Rooms**.

Alternatively, it may be easier to create the **Classes** by going to **Groups>Group Type Teaching Class>New Group** and then use the usual **Bulk Group Assignment Tool** option to add **Students** to all their new **Classes** in one go. The choice is yours.

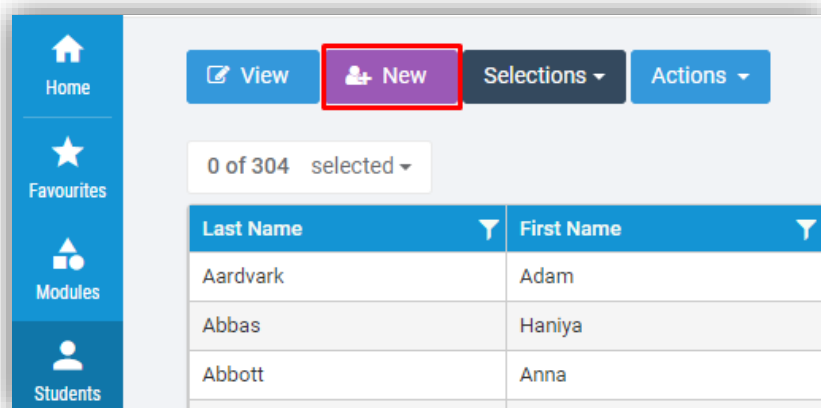
Please **contact the Helpdesk** if you need any assistance with this process.

	Year Group	Band	Class Name	Next Class	Next Band
⊖	07	07A	Ar07/A1	Ar8/A1	
⊖	07	07A	Ar07/B1	Ar8/B1	
⊖	07	07A	Da07/A1	D88/A1	
⊖	07	07A	Da07/B1	D88/B1	
⊖	07	07A	DR07/A1	DR8/A1	

## 10 Adding New Students

These can be added by any or all of the options below:

Go to **Students** and click on the **New** button.



This will open a form to enter in the new **Students** information. **Note:** The **Entry Date** defaults to **today's date**, amend if required.

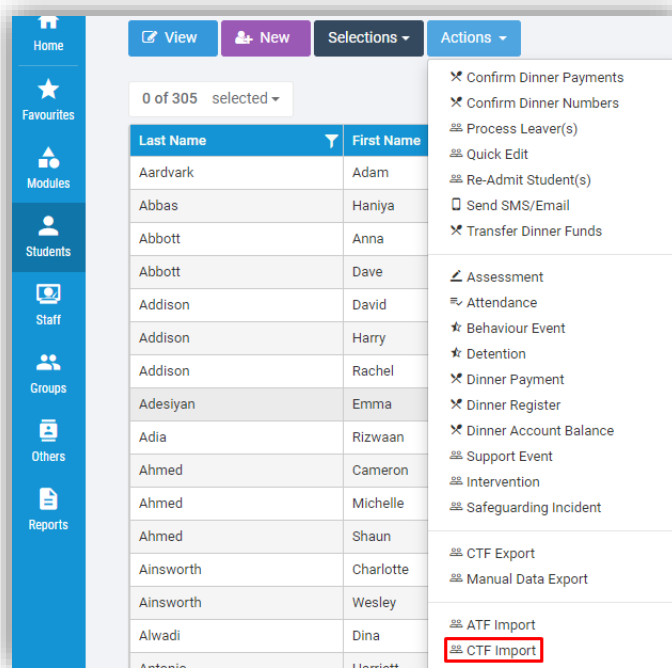
The 'Create New Student' form contains the following fields and options:

- Legal First Name\* (text input)
- Middle Name(s) (text input)
- Legal Last Name\* (text input)
- Former Last Name (text input)
- Pref. First Name (text input)
- Pref. Last Name (text input)
- Gender\* (dropdown menu, currently '<NOT SELECTED>')
- Date Of Birth\* (calendar icon)
- Birth Certificate (checkbox 'Seen')
- Age (text input)
- Student Type\* (radio buttons: 'On Roll' (selected), 'Pre-Admission')
- Entry Date\* (calendar icon, value: 07/06/2022)
- Enrolment Status\* (dropdown menu, value: 'Current(Single Registra...')
- Admission No\* (text input, value: S0358A)
- Attend Mode\* (dropdown menu, value: 'All Day')
- Sessions per week\* (text input, value: 10)
- Chronological YG (text input)
- Curriculum Year Gp\* (dropdown menu, value: '<NOT SELECTED>')
- Group Name (text input with search, back, and delete icons)
- House (dropdown menu, value: '<NOT SELECTED>')
- Data processing consent has been granted
- Buttons: Save (green), Save & Add Siblings (blue), Cancel (red)

Fill in the details and click on the **Save** button, this will now open the **Student Details** page on the **Profile Tab** option where additional information can be added. All fields marked \* must be completed.

Remember that you can also specify the **student's Tutor Group** and House for the **next Academic Year**.

Go to **Students List** page and from the **Actions** dropdown click on the **CTF Import** button.



This will open the **CTF Import** page.

**CTF Import**

Select the file that you want to import from and then complete the choices below

**Browse** Choose a file

- Student Basic Details
- SEN Information
- Student Optional Identifiers
- Assessment Data
- Early Years Foundation Stage
- Key Stage 1
- Student Contacts
- Looked After
- FSM History
- Y1 Phonics Check Data
- Key Stage 2
- Student Addresses
- School History
- Key Stage 3

In case of existing students, use CTF to:

Complete Missing Data

Select the text format to apply to names:

Use Initial Capital Letters for all

If the file contains new students (i.e. any that are not already recorded in the database), should they be placed into:

On Roll

Enter Admission Date: 01/09/2022

If the file contains LEAVER students (ie. any that are already in system with a date of leaving) should they be:

Excluded from import

Data relating to existing students will automatically be applied as appropriate.

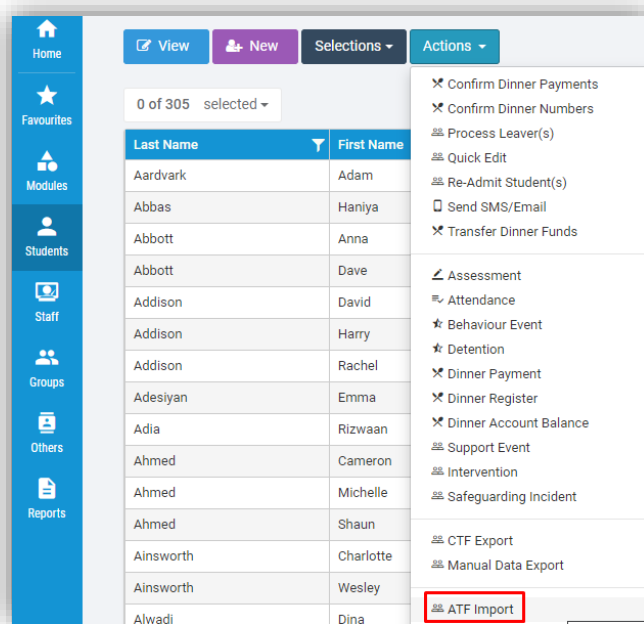
**Next >** **Cancel**

Information can be passed to the school from another school. Ensuring that you have the copy of the **CTF file**, you can then **Import** it into the Bromcom system.

Click on the **Browse** button for the **CTF Import file**, when found, select it, and click on the **Open** button. Then enter in the **Admission Date** for when the new **Students** will be starting.

Normally this would be the first day of the first term of the new **Academic Year**. Once you are happy, click on the **Next** button, check the data, and then click on the **Import** button to import the **Students** into the system.

Go to **Students List** page and from the **Actions** dropdown click on the **ATF Import** button.



This will open the **ATF Import** page.

A screenshot of the 'ATF Import' page. At the top, it says 'Select the file that you want to import from and then complete the choices below'. There is a 'Browse' button and a text input field. Below this are three columns of checkboxes for data fields to import, all of which are checked: Student Basic Details, SEN Information, Student Optional Identifiers, Early Years Foundation Stage, Key Stage 1, Student Contacts, Looked After, FSM History, Y1 Phonics Check Data, Key Stage 2, Student Addresses, School History, and Key Stage 3. There are also dropdown menus for 'In case of existing students, use ATF to:' (set to 'Complete Missing Data') and 'Select the text format to apply to names:' (set to 'Use Initial Capital Letters for all'). Below these are fields for 'Pre-Admission Groups\*' (set to '<NOT SELECTED>') and 'Enter Admission Date' (set to '01/09/2022'). At the bottom are 'Import' and 'Cancel' buttons.

Click on the **Browse** button for the **ATF Import** file, when found, select it and click on the **Open** button.

Next, select the pre-admission group you wish to import students in to.

Lastly, enter in the **Admission Date** when the new **Students** will be starting with you. Normally this would be the first day of the first term of the new **Academic Year**.

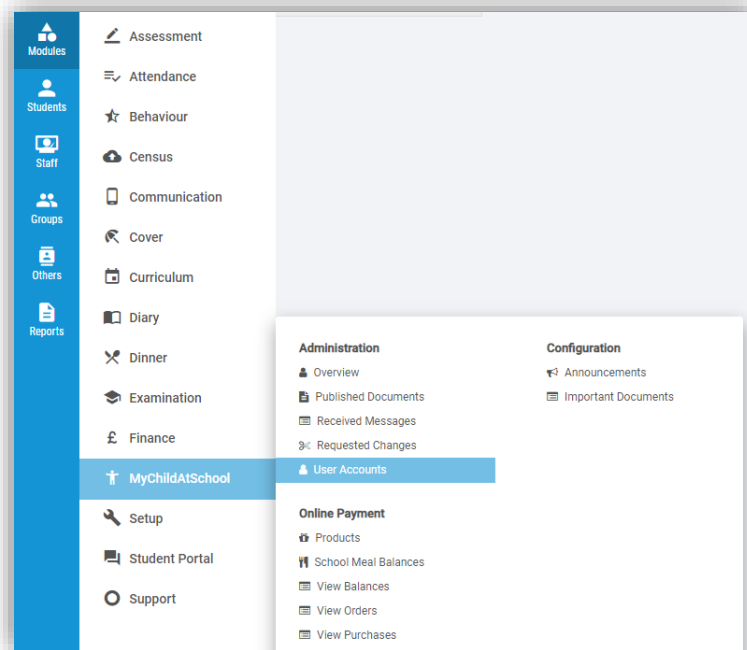
Once you are happy, click on the **Import** button to **Import** the **Students** into the system.

If you have any questions on making **Students Leavers**, please see the following **Guide**: [How to Process a Leaver](#)

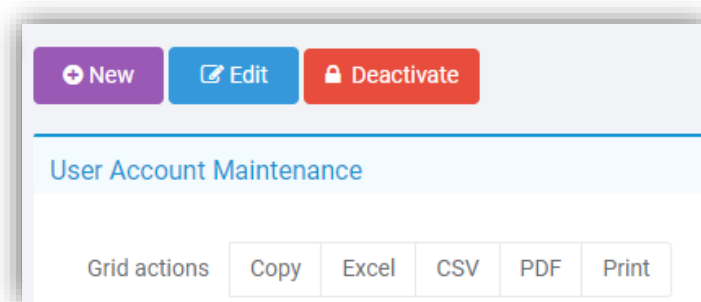
If you use **MyChildAtSchool** or **Student Portal**, proceed to the next section, otherwise move to **Section 12**.

## 11 Creating New MyChildAtSchool and Student Portal Accounts

**MyChildAtSchool Accounts** need to be completed on the first **Academic Day** of your 2022/23 **Academic Year**. If you use **MyChildAtSchool**, go to **Modules>MyChildAtSchool>User Accounts**.



This will open the **User Account Maintenance** page, displaying all the **Students** with a current **MyChildAtSchool Account**.



Click on the **New** button, this will display all **Students** who do not have a current **MyChildAtSchool Account**.

The screenshot shows the 'User Account Creation' page. It has two radio buttons: 'Select Students' (selected) and 'Select Contacts'. Below are 'Grid actions' buttons (Copy, Excel, CSV, PDF, Print) and a search box. A table displays a list of students with columns for Last Name, First Name, Tutor Group, Admission Number, and Year Group.

	Last Name	First Name	Tutor Group	Admission Number	Year Group
<input type="checkbox"/>	Abbott	Anna	13A	00120	13
<input type="checkbox"/>	Addison	David	13B	00032	13
<input type="checkbox"/>	Ainsworth	Charlotte	11TRO	S0190A	09
<input type="checkbox"/>	Ainsworth	Wesley	10LN	S0135A	10
<input type="checkbox"/>	Aziz	Michael	11A	S0113A	11
<input type="checkbox"/>	Barlow	Danielle	9B	S0170A	09

You can order the **Year Groups** for Year 7 for example by simply clicking on the **Year Group** field. If you want to create accounts for all **Students**, click on the tick box to the left of the **Last Name** column, you can now click **Next**.

The screenshot shows the 'User Account Creation' screen with the 'Select Students' radio button selected. At the top, there are buttons for 'Grid actions', 'Copy', 'Excel', 'CSV', 'PDF', and 'Print', along with a search box. Below is a table with columns: Last Name, First Name, Tutor Group, Admission Number, and Year Group. A tick box is checked in the 'Last Name' column header. The table contains three rows of student data.

<input checked="" type="checkbox"/>	Last Name	First Name	Tutor Group	Admission Number	Year Group
<input checked="" type="checkbox"/>	Frederick	Smith		PreAdm-0000000007	N/A
<input checked="" type="checkbox"/>	Maxwell	Jane		PreAdm-000013	N/A
<input checked="" type="checkbox"/>	Mortimer	Bob		PreAdm-000012	N/A

On the next screen, you can choose to create the **MyChildAtSchool User Accounts Manually** or **Automatically**. It is recommended that you use **Auto** and ensure you create the accounts to your requirements, for example the following image will create **User Accounts** for all **Priority 1 Contacts** who have **Parental Responsibility**.

The screenshot shows the 'User Account Creation' screen with the 'Auto' radio button selected. Below the radio buttons, there are filters for 'Contact priority level and Parental Responsibility'. The 'Parental Responsibility' checkbox is checked, and the 'Contact Priority' dropdown is set to 'All'. Below these filters is a table of contacts with columns: Access, Contact Name, Student First Name, Student Last Name, Relation, Admission No, Tutor Group, Year Group, Priority, Parental Responsibility, Court Order Restriction, and Show Student Details. The 'Generate' button is highlighted.

Access	Contact Name	Student First Name	Student Last Name	Relation	Admission No	Tutor Group	Year Group	Priority	Parental Responsibility	Court Order Restriction	Show Student Details
<input checked="" type="checkbox"/>	Miss A Booth	Carrie-Ann	Chatterjee	Mother	S0311A	07B	2	1	Yes	No	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Miss M Perry	Roy	Hamer	Mother	S0320A	07A	6	1	Yes	No	<input checked="" type="checkbox"/>

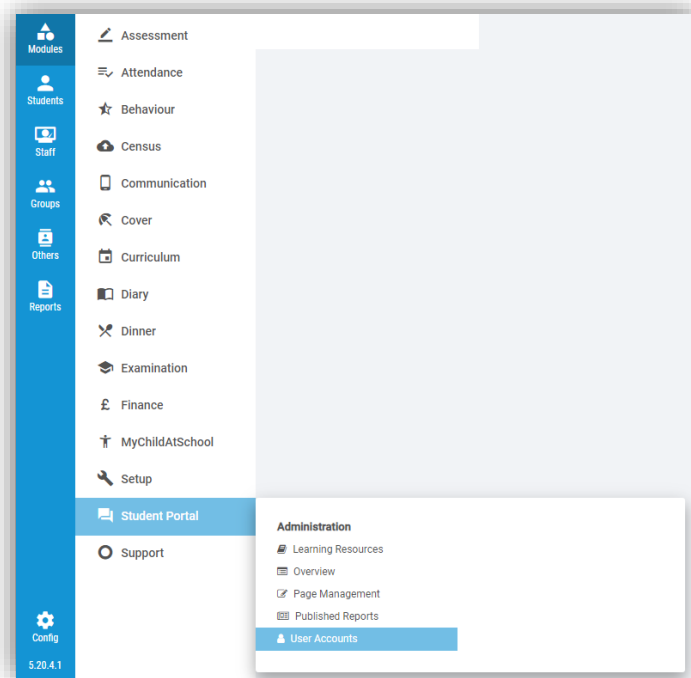
Click on the **Generate** button once you are ready to create the **New Accounts**, all the created **Login Names** and **Invitation Codes** will then be presented for every **Contact**.

The screenshot shows the 'User Account Creation' screen displaying the results of the account generation. The table has columns: Contact Name, Login Name, Invitation Code, Is Active, and Students. The 'Generate' button is no longer visible, and a 'Close' button is present at the bottom.

Contact Name	Login Name	Invitation Code	Is Active	Students
Miss Ashley Booth	Booth2938	D81EC2994A	Enabled	Chatterjee Carrie-Ann
Miss Michelle Perry	Perry2950	EBDECB564C	Enabled	Hamer Roy

You can **Export** or **Print** this information by clicking on the **CSV** icon in the top left of the table of created **Accounts**.

If you use the **Student Portal**, please now go to **Modules>Student Portal>Administration>User Accounts**.



User Account Maintenance

Grid actions:      Search:

<input type="checkbox"/>	Admission Number	Last Name	First Name	Tutor Group	Year Group	Username	Windows Account Name	Email	Active	Status
<input type="checkbox"/>	00000	Smith	Jane	13A	13	Smith14			Yes	Current
<input type="checkbox"/>	00005	Auguste	Tony	13A	13	Auguste63			Yes	Current
<input type="checkbox"/>	00029	Kuukua	Cindy	13B	13	Kuukua143			Yes	Current
<input type="checkbox"/>	00032	Addison	David	13B	13	David		roger.lewis@bromcom.com	Yes	Current
<input type="checkbox"/>	00077	Kirchel	Phillip	13A	13	Kirchel291			Yes	Current

Then click on the **New** button.

You can order the **Year Groups** to Year 7 for example by simply clicking on the **Year Group** field. If you want to create accounts for all **Students**, click on the tick box to the left of the **Last Name** column, you can now click **Next**. If you're creating accounts for the new intake you can click on the **Future** radio button and that will display all future **Students**.

User Account Creation

Current
  Leaver
  Future
  Select All

Grid actions:      Search:

Last Name	First Name	Tutor Group	Adm. No.	Year Group
Gregory	Spencer	07A	S0354A	

On the next screen, you can choose to **Generate** the **Student Portal User Accounts Manually** or **Automatically**. By selecting **Auto**, all the **User Names** and **Invitation Codes** for each **Student** will be generated automatically, if you select **Manual**, you can choose what **User Name** and **Invitation Code** each account will use. Click on the **Save** button to create the **User Accounts**.

User Account Creation

Manual (Ideal for creating individual accounts)  
 **Auto** (Ideal for creating new accounts en masse, this option will Auto Generate the User Name and password for each student, meeting the criteria set below)

Based on your selection, students below will have user accounts.

Admission No	Student Last Name	Student First Name	Tutor Group	Year Group
S0355A	Aardvark	Adam	07A	07
S0305A	Alwadi	Dina	07B	07
S0306A	Atkinson	Andrew	07A	07
S0307A	Bakalova	Lillie-Mae	07B	07
S0308A	Barry	Claire	07A	07
S0353A	Bishop	Jessica	07B	07
S0309A	Borysiewicz	Sally-Jane	07B	07

Once you have done this, you will be given a list of all the **Login Names** and **Invitation Codes** created.

User Account Creation

Student Name	Login Name	Invitation Code	Is Active
Aardvark Adam	Aardvark4046	A96D3D1945	Yes
Alwadi Dina	Alwadi2926	AB1E98D84A	Yes
Atkinson Andrew	Atkinson2928	69DBE9DE4A	Yes
Bakalova Lillie-Mae	Bakalova2929	7FB49EA240	Yes
Barry Claire	Barry2930	430CF74246	Yes
Bishop Jessica	Bishop4030	1C5B5FEC4B	Yes
Borysiewicz Sally-Jane	Borysiewicz2931	58F168A94A	Yes



## 12 Data Archiving and DMS Storage

This section will assist you with **Archiving** the oldest **Academic Year** in your MIS system and how to manage the **DMS Storage** linked to your MIS system.

### Data Archiving



Please note that this process is **IRREVERSIBLE** so ensure you have reviewed the process carefully before completing.

Please call the Helpdesk on 020 8290 7177 if you have any questions.

To see the previous **Academic Years** that have been archived on your system, go to **Modules>Setup>Data Archiving**. It may show nothing if this is the first time you are performing this process.

Year	Archived Date	Archived By
No data available in table		

The **Archiving** process and which **Academic Year** will be processed will be displayed on the **Data Archive Configuration** page. From here you can also review exactly what will be archived and what will be **permanently deleted** from your MIS system.

This process will archive oldest academic year in the system: 2012

The following data will be transferred to archive tables and removed from the system:

- Attendances (AM/PM & Class)
- Assessment Results
- Behaviour Events
- Exam Results

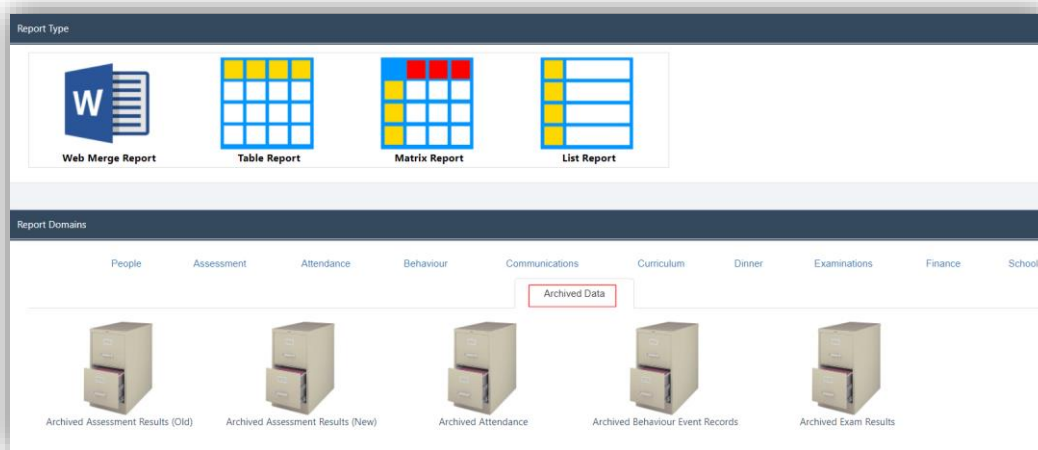
The following data and their links will be deleted from system permanently for selected academic year:

- Groups, Memberships and Timetables (inc. Classes & Tutor Groups)
- Cover Data
- Exams Data
- Detentions
- Academic Year Calendar
- Attendance Comments
- Student's Planning Learning Hours
- Support Timetables

Data transferred into archive tables can be accessed and reported via Reporting module's ARCHIVE section.

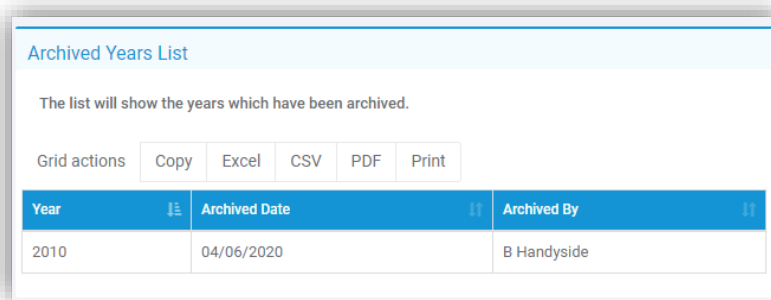
This process is IRREVERSIBLE! Please enter your password below and click the "Archive Now" button to start the archiving process!

This information can be accessed and reported on via the **Ad-Hoc Reporting** module using the **Archived Data Report Domain**.



Once you have reviewed and are happy to proceed, you will need to enter your **MIS Account Password** before clicking on the **Archive Now** button.

The process will run and take you back to the previous screen with a confirmation message at the top of the page to indicate the process was completed successfully and now you should see the **Academic Year** you have just **Archived** in the **Archive Years** list.



### DMS Storage

You should also review your **DMS Storage** and remove any reports/documents that are no longer needed. Please refer to the **Managing the DMS** guide that is available in the **Documentation Centre: How the Manage the DMS**.

This is the end of the **End of Year Guide for Secondary School 2022-23**

If you have any issues or queries, please do not hesitate in contacting the Helpdesk on **020 8290 7177**.

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