

## Prepare for New School Year Tool

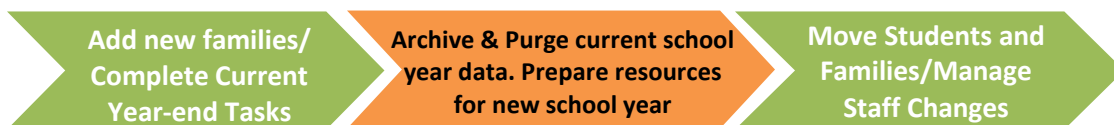
### Introduction

At the end of the school year, after finalizing current school year data, archive it before promoting students, moving up new families and removing graduating and outgoing families. The [Admin] tool 'Prepare for New School Year' lets you archive current school year data and prepare your SchoolSpeak account ready for the new school year in three easy steps.

Adding new families for the new school year may begin as soon as registration opens, even before archiving current school year data and promoting current students. Do not add new families to current family groups such as School, Kindergarten, 1<sup>st</sup> grade and 2<sup>nd</sup> grade. Instead, create staging groups such as 'New Families', 'New-K', 'New-1' and 'New-2' and add them using 'Add family' admin tool. Once a new family is added to SchoolSpeak, you may send them their new SchoolSpeak login information. Inviting new families to join is a great way to welcome them to the school community and to start involving them in school activities increasing their school loyalty. Refer to Adding New Families information for details.

### New School Year Preparation Process

New school year preparation has three main steps:



1. Finalize current school year data: Grade books, report cards, volunteer hours log, SCRIP tracking, etc.
2. Archive the current school year's data and purge the data in resources to prepare them for new school year.

#### Archiving:

Creating a read only copy of the current school year data so that it can be accessed in future is archiving. For example, a copy of 2014-15 report cards for future access.



*SchoolSpeak recommends archiving and purging at least two weeks after the school closure so that you as well as parents have enough time to check and finalize grade books and report cards. Archived data cannot be modified. You will have only view access to archived data.*

### Purging:

Deleting old data from the live system is purging. For example, deleting old announcements, calendar events, gradebook, and report card data. This step also prepares resources for new school year.

3. Promote students, remove outgoing families, and handle staff changes.

The **'Prepare for New School Year'** tool takes you through these steps.

**Note:** If you need help in performing any of these tasks, please contact SchoolSpeak Support at [support@SchoolSpeak.com](mailto:support@SchoolSpeak.com).

## How to Access Prepare for New School Year Tool

This tool is accessible only to SchoolSpeak account administrators. As an account administrator, to access the Prepare for New School Year tool:

1. Click **[Admin] link** on the top-left of any SchoolSpeak page to go to the **'Admin Utilities'** page.
2. Select **'Prepare for New School Year'** from Manage Resources.

## How to Use Prepare for New School Year Tool

The tool has four steps. Perform them in order.

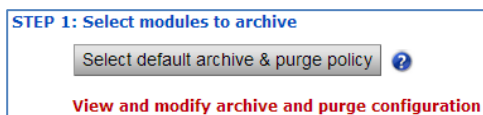
**STEP 1: Select modules to archive**

**STEP 2: Archive and delete old data**

**STEP 3: Move Students**

**STEP 4: Mark preparation for next school year as complete**

Click **STEP 1: Select modules to archive** link. It will expand to show two options:

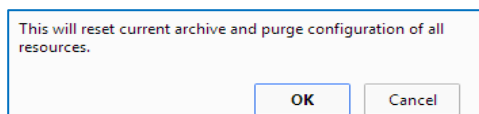


**Note:** Click  to view the Default Archive & Purge Policy in detail.

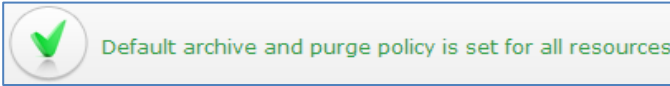
First, select the default archive and purge policy for all the resources. Then review the archive and purge configuration of all resources and modify them as required.

**Note:** Currently resources may not be using default archive policy and selecting the default archive and purge policy is required to bring them to recommended configuration.

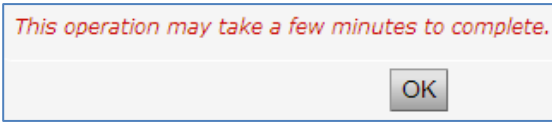
a. Click the **Select default archive & purge policy** button. You will see the confirmation message to reset the current configuration of resources for archiving and purging.



Click the **Ok** button. Default Archive and Purge Policy is applied to all the resources in your SchoolSpeak account and the page will refresh with the status message.



As this step can take a minute or two to complete, the system displays an alert message.



- b. If you want to make changes to the default archive and purge policy for any resource, click **View and modify archive and purge configuration** link. It will take you to the **Resource Archive Configuration** page where you can search resources you want to review archiving and purging configuration and make changes.

**Resource Archive Configuration**

[Go back](#)

**Search:**

Name:

In Group:  1

With Resource Type:  2

Include hidden resources 2

Group	Name	Type	Archive	Delete old data?	
School	Announcements	Bulletins		Keep data from last 365 days	<a href="#">[Edit]</a>
School	Newsletters	Bulletins		Keep data from last 365 days	<a href="#">[Edit]</a>
School	School Calendar	Calendar		Keep data from last 365 days	<a href="#">[Edit]</a>
School	Forms	WebPage		Do not delete	<a href="#">[Edit]</a>
School	Admission Form	Forms	X	Do not delete	<a href="#">[Edit]</a>
School	Family Service Tasks	SignUp	X	Do not delete	<a href="#">[Edit]</a>
School	Yard Duty Volunteers	VolunteerCalendar	X	Keep data from last 365 days	<a href="#">[Edit]</a>
School	Order Scrip	OnlineOrder	X	Delete all past data	<a href="#">[Edit]</a>
Kindergarten	Announcements	Bulletins		Keep data from last 365 days	<a href="#">[Edit]</a>
Kindergarten	About Kindergarten	WebPage		Keep data from last 365 days	<a href="#">[Edit]</a>
Kindergarten	Calendar	Calendar		Keep data from last 365 days	<a href="#">[Edit]</a>
Kindergarten	Homework	HomeWork		Keep data from last 365 days	<a href="#">[Edit]</a>
Kindergarten	Attendance	Grade	X	Delete all past data	<a href="#">[Edit]</a>
Kindergarten	Report Card	ReportCards	X	Delete all past data	<a href="#">[Edit]</a>

1. List the resources you want to review archive and purge policy by selecting **Group** and **Resource Type** and clicking **Search**.
2. Hidden resources are the ones not visible on the Home page as their link and content check boxes are disabled. For example, a Parent-teacher Conference Signup resource is hidden after that event.

To modify the configuration, click **[Edit]** link next to the resource. It will take you to a page where you can modify the archive and purge policy for the resource.

**Archive and data purge policy:**

Archive this resource:

After archiving is run, delete data from this resource?

Delete data up to archive date  
 Do not delete data  
 Retain data up to these number of days before archive date  days

Purge data older than

This is for manual purging at any time. Purge options cannot be modified for all resources. If you can't modify, contact SchoolSpeak support.

1. Select the **Archive this resource** check box for archiving the resource.
2. Select one of the purge options.

**Note:** Purge options cannot be modified for all resources. If you can't modify, contact SchoolSpeak support. 'Retain data up to ....' allows only maximum 365 days.

- Delete data up to archive date: Deletes the data up to 'Archive data up to' date (see STEP 2).
- Do not delete data: Does not delete the data from resource.
- Retain data up to these numbers of days before archive date: Retains the data of the specified number of days before the 'Archive data up to' date. You can change the number of days for some of the resources. However the maximum is 365 days.

**Note:** These options available for selection differ from resource to resource.

3. Make any changes and click the **Update** button.

Repeat the same steps for all the other resources that you want to modify the default configuration.

**Important:** In the Lesson Plan resource, if the flag '**When archived, copy records to next School Year**' is enabled in its **Settings** page, then the lesson plans for the current school year along with its homework will be copied to the next school year with similar dates while archiving. If you do not

want the lesson plan and homework to be copied to the next year, you need to disable this flag on the **Lesson Plan Settings** page.

## STEP 2: Archive and delete old data

This step lets you pick up the start and end date for the data to be archived, performs archiving and purging, and prepares the resources for new school year.

**STEP 2: Archive and delete old data**

**Archive description:**

**Archive data from:**

**Archive data up to:**

*Please enter the term dates for next school year. Tentative term dates for the next year are populated based on current term dates. You can modify these term dates later in [Admin] => [Edit Gradebook Parameters] tool*

**Term1:** Start Date:  End Date:

**Term2:** Start Date:  End Date:

**Term3:** Start Date:  End Date:

**Term4:** Start Date:  End Date:

1 Input term dates for new school year and you can modify later, if need be. SchoolSpeak will use these dates to setup gradebooks and attendance books. Use only two rows for semesters or three rows for trimesters.

- **Archive description** and **Archive data from** date are set by SchoolSpeak based on the last account archive or the account creation time.
- **Archive data up to** - Select a cut-off date for including data in the archive. Make sure to select today or a past date.

Records in SchoolSpeak resources have one or more date associated with them and they are used for selecting the data to be archived.

- For a calendar event, it is the event date.
- For gradebook assignments, it is the assignment date.
- For announcements, the 'From' and the 'To' dates.
- For volunteer time log, it is the date associated with each entry.

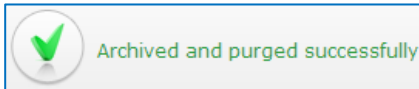
**Note:** *The date record is created, for example, when the calendar event created is not considered for archiving.*

The 'Archive data from' and 'Archive data up to' dates are used for selecting records for archiving. If the archive data from date is 7/1/2014 and archive data up to date is 6/30/2015, all records with dates within this date range are selected for archiving.

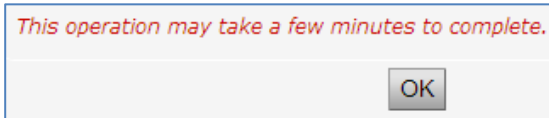
**Archive data from:** SchoolSpeak automatically fills this date based on 'Archive data up to' date from last archive. If this is the first time archive is performed, it will be the account creation date.

**Archive data up to:** Select the cut-off date for selecting records for archiving. For example, if the archiving is done on 6<sup>th</sup> of July, 30<sup>th</sup> of June can be 'Archive data up to' date matching the school financial year. The 'Archive data up to' date needs to be a past date.

Click the **Archive & Purge** button. The page will refresh with the archive and purge status message.



**Note:** As this step can take a minute or two to complete, the system displays an alert message.



### STEP 3: Move Students

In this step you will

- move students and families not returning to 'Not returning 2015' group
- move graduating students and parents to 'Class of 2015' group
- promote students to next grade and
- disable SchoolSpeak access for graduating class and families not returning.

SchoolSpeak access is not disabled for parents of graduating or leaving students with siblings returning to school next year.

Instead of disabling SchoolSpeak access of graduating families and left families, you have option to delete them. SchoolSpeak doesn't recommend deleting them for few months as you may need to communicate with them.

**STEP 3: Move Students**

1 To move and retain all graduating students and families

Create a group 'Class of 2015'

2 To move all non-graduating students and families who will not return to school next year. This group will not be visible to parents.

Create a group 'Not returning 2015'

**Move Students**

**a. Move families not returning using 'Student Transfer'** (Remember to uncheck 'Do not remove from source group'.)

**b. Move up students**

**Use Batch Group Transfer** (If you have one class per grade.)

OR **Use Student transfer** (If you have multiple classes per grade or multiple grade levels per class.)

**c. Disable 'Class of 2015' and 'Not Returning 2015'**

If you haven't already created a group for moving graduating students and families, click on **Create a group 'Class of 2015'** button to create a group for moving all graduating families. The page will refresh with the status message.

If you haven't already created a group for moving families not returning, click on **Create a group 'Not Returning 2015'** button to create a group for moving families not returning. The page will refresh with the status message.

If you want to review and modify configuration of the groups created, use the Admin tool **'Edit groups'**.

#### a. Move Families not returning using Student Transfer tool

The two groups not returning are graduating students (Alumni) and left families (during the year you may have put the transferred out families into a 'Left Families' group and at the end of the school year, you want to move them and families that decided not to return next year to the Not Returning 2015 group). You can move these not returning families to the groups of **Class of 2015** and **Not Returning 2015** respectively, using the **Student Transfer** tool.

The below steps and picture show how to move two 4<sup>th</sup> grade students and their families to **Not Returning 2015** group.

1. Click **Move families not returning using 'Student Transfer'** link to access 'Student Transfer' tool.
2. Select Grade 4 from Transfer From drop-down list to view 4<sup>th</sup> grade students.
3. Select the students not returning.
4. Select **Not Returning 2015** from **Transfer To** drop-down list.
5. Uncheck 'Do not remove from source group' and click on **Transfer** button.

**Student Transfer**

Transfer From: Grade 4

Transfer To: Left Families

Do not remove from source group **1**

Move guardians also **2**

Make sure to uncheck this as you don't want the students not returning to be left in Grade

Check 'Move guardians also' to move the parents along with the students.

Transfer

Select Students to transfer:

<input checked="" type="checkbox"/> Student(s)
<input type="checkbox"/> Bradford, Karen
<input type="checkbox"/> Brown, Jonathan
<input type="checkbox"/> Chu, Jeff
<input type="checkbox"/> Jones, Christy
<input type="checkbox"/> Kendricks, Allison
<input type="checkbox"/> Smith, David
<input type="checkbox"/> Smith, Pat
<input checked="" type="checkbox"/> Smith, Raymond
<input checked="" type="checkbox"/> Taylor, Roger

The page will refresh with the transfer status message.

You can use either **Batch Group Transfer/Student Transfer** tool for moving the graduating families.

**b. Move up Students (Promote Students)**

You can move students (along with parents) to higher grades using **Batch Group Transfer** (if you have one class per grade) as well as **Student Transfer** (if you have multiple classes per grade).

**Move students using Batch Group Transfer tool**

Click **Use Batch Group Transfer** link. Batch Group Transfer tool page opens up.

Batch Group Transfer

Warning: Do not transfer students before archiving current school year data.

\* This page can be used to move Students and Parents from one group to another. This is very useful for promoting students to a new grade at the end of the school year.

\* The move will be done in sequential order. First the move in row 1 is executed, and then row 2 and so on. Make sure that the destination group is ready before performing the move. For example, delete outgoing 8th grades and thus prepare 8th grade group before moving 7th graders to 8th grade in row 1. Now the 7th grade is empty and you can move the 6th graders to the 7th grade in row 2.

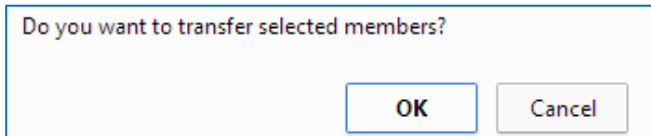
\* If you don't want to remove the students and parents from the source group during a move, select the 'Do not remove from source group' check box in that row.

#	Do not remove from source group	Source Group <span style="float: right;">1</span>	Destination Group <span style="float: right;">1</span>
1	<input type="checkbox"/>	Grade 8 ▼	Class of 2015 ▼
2	<input type="checkbox"/>	Grade 7 ▼	Grade 8 ▼
3	<input type="checkbox"/>	Grade 6 ▼	Grade 7 ▼
4	<input type="checkbox"/>	Grade 5 ▼	Grade 6 ▼
5	<input type="checkbox"/>	Grade 4 ▼	Grade 5 ▼
6	<input type="checkbox"/>	Grade 3 ▼	Grade 4 ▼
7	<input type="checkbox"/>	Grade 2 ▼	Grade 3 ▼
8	<input type="checkbox"/>	Grade 1 ▼	Grade 2 ▼
9	<input type="checkbox"/>	Kindergarten ▼	Grade 1 ▼
10	<input type="checkbox"/>	Please Select ▼	Please Select ▼

2 Perform Move
Clear 3

1. Select the Source Groups and Destination Groups.
2. Click on **Perform Move** button to move the groups
3. If you need to use the tool again, click on Clear to clear the fields to enter new details.  
You will see a confirmation message box.





4. Click on **Ok** button. The page will refresh with the transfer status message.

### **Move students using Student Transfer tool**

If your school has multiple classes per grade, for example 8A, 8B, 7A, 7B, etc. and you mix students as they are moved up, use the Student Transfer tool. First make sure that 8A and 8B are moved to 'Class of 2014'. Next, using Student Transfer tool, select students in 7A going to 8A and move them. Repeat the steps for 7A students going to 8B. Similarly move students from rest of the classes to their destination groups.

If you don't want families to know their class allotment yet, move all 7<sup>th</sup> graders to 8A now. When time comes, you can use Student Transfer tool to move 8B students from 8A.

### **C. Disable Login for 'Class of 2015' and 'Not Returning 2015'**

Use the Admin tool '**Batch Member Delete/Disable**' to disable login access for 'Class of 2015' and 'Not Returning 2015' groups. This tool helps to retain access for parents of graduating or leaving students with siblings returning to school next year.

On the Batch Member Delete/Disable page, select the group **Class of 2015** from **In Group** drop-down and click the **Search** button.



*Take care not to disable logins of parents with younger students still attending the school and retain them in the required groups.*

**Note:** You can use the similar approach to disable login of Families Not Returning.

**Batch Member Delete/Disable**

**Search:**

Last Name:

First Name:

Login Id:

In Group: **Class of 2015** ▼

With Member Type: **Any Member Ty** ▼

**Search**   **New Search**

As per this message here, the parents having the students in other groups are unselected. Make sure you do not disable login of the unselected parents

*\* Member type other than 'Student' and 'Parent' are unselected below.*

*\* Parents with children in groups other than 'Class of 2015' are unselected below. However they will be removed from 'Class of 2015' when the students are deleted.*

*\* Parents edit rights on the selected students will be removed when the student login is disabled.*

*\* Review the selection below before performing delete/disable.*

**What do you want to do?**

[+] **Delete selected members below**

[+] **Disable login of selected members below**

Click to remove these members from all other groups to which they are associated with.

**Disable login of selected members AND**

Remove selected members from all groups other than the groups selected below:

<input type="checkbox"/> School	<input type="checkbox"/> Staff	<input type="checkbox"/> Kindergarten
<input type="checkbox"/> Grade 1	<input type="checkbox"/> Grade 2	<input type="checkbox"/> Grade 3
<input type="checkbox"/> Grade 4	<input type="checkbox"/> Grade 5	<input type="checkbox"/> Grade 6
<input type="checkbox"/> Grade 7	<input type="checkbox"/> Grade 8	<input type="checkbox"/> PTA
<input type="checkbox"/> Drama Club	<input type="checkbox"/> Book Club	<input type="checkbox"/> Chess Club
<input type="checkbox"/> Left Families	<input checked="" type="checkbox"/> <b>Class of 2015</b>	<input type="checkbox"/> Not Returning 2015

**Disable selected members**

Clicking on this disables the login

**Search Results:**

☐	Name	Type	Group	Associations
<input checked="" type="checkbox"/>	<b>Blass, Jacob</b> /	Student	School Class of 2015	Father: <b>Blass, Michael</b> Mother: <b>Blass, Sandra</b>
<input checked="" type="checkbox"/>	<b>Blass, Michael</b> /	Parent	School Class of 2015	Child: <b>Blass, Jacob</b>
<input checked="" type="checkbox"/>	<b>Blass, Sandra</b> /	Parent	School Class of 2015	Child: <b>Blass, Jacob</b>
<input type="checkbox"/>	<b>Dallas, Eve</b> /	Parent	School PTA Chess Club Class of 2015 Grade 8	Child: <b>Dallas, Michelle</b> Child: <b>Dallas, Nathan</b> Spouse: <b>Dallas, Roarke</b>
<input checked="" type="checkbox"/>	<b>Dallas, Nathan</b> /	Student	School Class of 2015	Father: <b>Dallas, Roarke</b> Mother: <b>Dallas, Eve</b>
<input type="checkbox"/>	<b>Dallas, Roarke</b> /	Parent	School Book Club Class of 2015 Grade 8	Child: <b>Dallas, Michelle</b> Child: <b>Dallas, Nathan</b> Spouse: <b>Dallas, Eve</b>
<input type="checkbox"/>	<b>Grant, Robert</b> /	Teacher	Staff Grade 1 Grade 4 School Class of 2015	

### STEP 4: Mark preparation for new school year as complete

1. On clicking this, you see the archive information as in the picture.

**STEP 4: Mark preparation for next school year as complete**


**Archives:**

#	Description	Archive From	Archive To	Archived On	
1	<a href="#">2014-15 Archive</a>	6/9/2014 12:00:00 AM	4/12/2015 9:16:00 PM	4/12/2015 8:12:36 AM	<a href="#">Delete</a>

2. Click on **Mark as completed** button. Now you see the confirmation message box.

This will mark the archive process as completed. Are you sure to continue?

3. Click on **OK** button to mark the archive and purge process as complete. Now the page will refresh with the status message.

 Successfully marked as complete