SchoolSpeak
Your School and You

Preparing for New School Year

This session

- What is the "Preparing for the new school year" process

- Key term review

- How to use the Prepare for Next School year administrative tool

- Options for moving students

What is involved in preparing for the next school year?

- ► Process starts at the end of the current school year
- ► Schools will save this year's data
  - ► By default Gradebooks, attendance records, report cards, Invoice and lunch order data, lesson plans, group memberships and profile data
- ► When should the schools do this?
  - ► SchoolSpeak recommends doing this 2 weeks after the last day of school
  - ► The data being archived must be final!

Before you begin

- ► Finalize all gradebooks and report cards
  - ► Make sure that you have previewed report cards for all students
- ► Review the current groups in your account
  - ► Note which groups are for the grade level, subject level and other groups
- ► Continue to add new families for next year
  - ► Do not put them into current grade groups!
  - ► Use holding groups – New Families, New 1, New 2
- ► Do not move staff or current year students until after you begin to use *Prepare for New School Year* admin utility

Quick Review

- Groups – Used to organize members
  - May also include resources
  - Schools may have multiple groups
    - School group
    - Grade level groups (Grade 1, Grade 2)
    - Multi-section grade level groups (Grade 1A,
      Grade 1B)
    - Multi-section subject groups (Math A, Math B)
    - Extra-curricular activities /other groups (Book or Chess Club, PTO, Bus 1)
  - Group memberships will be saved as part of the process

Quick Review

- Members – Any person who has a profile within SchoolSpeak
  - Members may be part of 1 or more groups
  - Members have profile data that should be saved
  - Members may be included in gradebooks, report cards, attendance records
    - All of these resources have data that should be saved

Quick Review

- ▶ Resources –
  - ▶ Mini-applications that are part of groups
  - ▶ Some resources retain member specific data
    - ▶ Gradebooks hold the student members' grades
    - ▶ Attendance books contain the student members' attendance records
    - ▶ Report Cards have the term summary data for each student member
  - ▶ Some resources need to be purged each year so that old data is not continuously carried year after year
    - ▶ Gradebooks and report cards
  - ▶ Other resources should be left alone to keep data available
    - ▶ Multi-year capital donation fund tracker

Additional Terms to know

Archiving - Saving the current school year's important data into a read only file that may be accessed by SchoolSpeak administrators in the future

Purging is the process of deleting data from a resources.

   - For example: Current school year gradebook data is purged after archiving in preparation for new year

What is the Archive and Purge Policy?

▶ A groups of settings that determines what will happen to each resource that is part of your application

Prepare for new school year Simple 4 Step Process

▶ Step 1 – Verify your archive policy choices
  ▶ Most schools leave the standard defaults
▶ Step 2 – Archive and Purge
  ▶ Determine date for archive to occur
  ▶ Set terms dates for next year
    ▶ AUTOMATICALLY UPDATE THE DATES IN THE GRADEBOOKS
▶ Step 3 – Move the students and families for next school year
  ▶ Identify students/parents who are leaving the school
  ▶ Work on any groups that should be cleared
    ▶ Sections, activity, private groups
  ▶ Promote current students
▶ Step 4 – Mark archive process complete

Let's walk through the Prepare for new school year tool

Don't worry we will break down each step!

Step 1 – Select modules to archive

- ▶ Schools may choose to use the default archive/purge policy or may modify the archive and purge configuration to fit their own school needs
- ▶ 3 Options for each resource
  - ▶ Do not delete – A copy of the resource is made and data is not deleted.
  - ▶ Keep data from last ### days – Data associated with dates within a certain number of days prior to the archive date is retained, content that existed before that time frame is deleted
  - ▶ Delete all past data – All data within the resource is purged
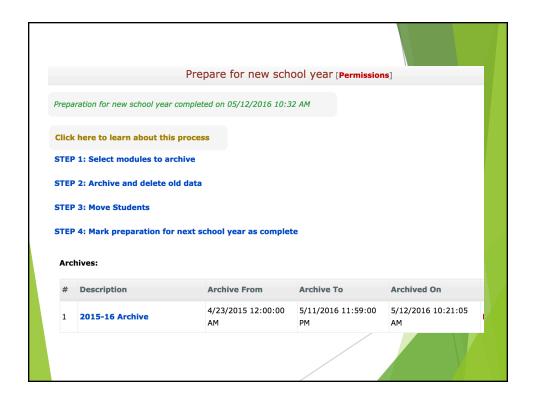- ▶ May view and set the default/archive policy
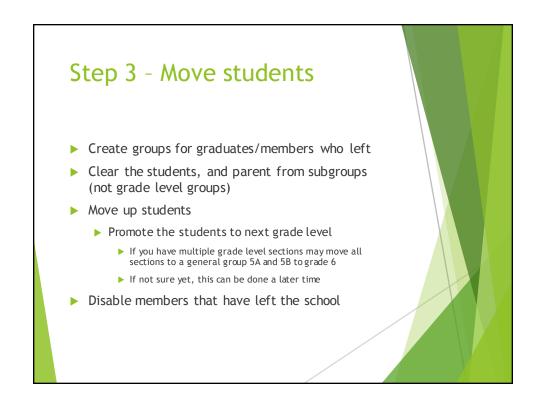
Step 2 – Archive and Delete old data

- Setup the archive date
  - From – Auto setup as last archive date or setup date
  - To – Enter the date 2 weeks past last day of school**
- Enter term dates for next year
- Verify that all report cards have had a final preview so that you are saving a report card for each student
  - Use Manage Report Cards

Important Notes Regarding Archive Date

- Date must be earlier than date you try to run the archive
  - Today's date – June 15th
  - Archive Date cannot be past June 15th
- For some resources the date makes a very big impact
  - For lunch order – Data is purged at the end of the month. For example:
  - If choose June 15th – Data prior to May 31st is purged.
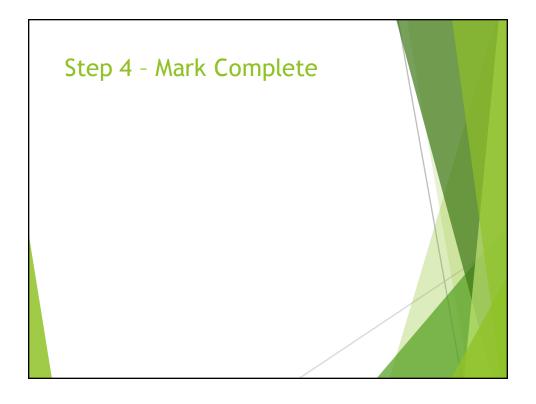   - **Balances remain
  - To capture June data do archive as of July 1st. Then data as of June 30 is purged.
    - **Balances remain
- Review the settings pages of the resource for specifics
  - Online order – Admin may choose data setting options

Prepare for new school year [**Permissions**]

Preparation for new school year completed on 05/12/2016 10:32 AM

Click here to learn about this process

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

Archives:

#	Description	Archive From	Archive To	Archived On	
1	**2015-16 Archive**	4/23/2015 12:00:00 AM	5/11/2016 11:59:00 PM	5/12/2016 10:21:05 AM	

Step 3 – Move students

▶ Create groups for graduates/members who left
▶ Clear the students, and parent from subgroups (not grade level groups)
▶ Move up students
  ▶ Promote the students to next grade level
    ▶ If you have multiple grade level sections may move all sections to a general group 5A and 5B to grade 6
    ▶ If not sure yet, this can be done a later time
▶ Disable members that have left the school

Moving students in SchoolSpeak

- Student Transfer – *SchoolSpeak Admins only*
  - Transfer or copy students (and guardians) from one group to another
- Batch group transfer – *SchoolSpeak Admins only*
  - Move entire groups of students/guardians
  - Good for single grade section schools
- Modify group membership at group level – *SchoolSpeak and Group Admins*
- Remember to start with the highest grade in school

Step 4 – Mark Complete

Additional things to think about

- ▶ When the process to Prepare for new School year is complete
  - ▶ Add new students/families as part of moving current students or do after current students have been moved
  - ▶ Make faculty changes as needed
    - ▶ Remember to review your teacher's resource permissions as part of your summer maintenance

Final thoughts…

- ▶ Ask new teachers to take part in SchoolSpeak's summer training sessions (July/August)
- ▶ Work with SchoolSpeak support if you have any questions as you plan for next year

Questions?

Call us 877 773 2513

Email support@schoolspeak.com

Setup an appointment to work a SchoolSpeak support person to walk through the process