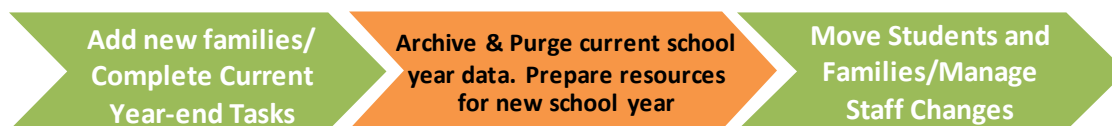# Prepare for New School Year Tool

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, 1st grade and 2nd 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:

Add new families/ Complete Current Year-end Tasks	Archive & Purge current school year data. Prepare resources for new school year	Move Students and Families/Manage Staff Changes

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.

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:

STEP 1: Select modules to archive

Select default archive & purge policy

View and modify archive and purge configuration
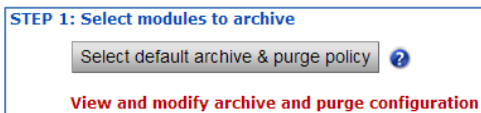
Note: Click 🌐 *to view the Default Archive & Purge Policy in detail.*

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

This will reset current archive and purge configuration of all resources.

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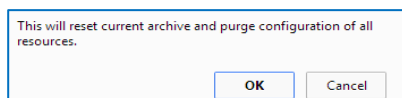
Click **Ok**. Default Archive and Purge Policy is applied to all the resources in your SchoolSpeak account and the page will refresh with the status message.

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

This operation may take a few minutes to complete.

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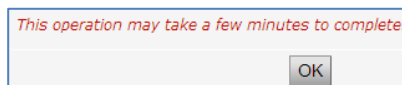
b. If you want to make changes to the default archive and purge policy for any resource, click **View and modify archive and purge configuration** link. It will take you to the **Resource Archive Configuration** page where you can search resources you want to review archiving and purging configuration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

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 the [**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.

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 **Update**.

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.

- **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 6th of July, 30th 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 **Archive & Purge**. 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.

If you haven't already created a group for moving graduating students and families, click **Create a group 'Class of 2015'** 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 **Create a group 'Not Returning 2015'** 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 4th 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 4th 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 **Transfer**.

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

1. Select the Source Groups and Destination Groups.
2. Click **Perform Move** to move the groups
3. If you need to use the tool again, click **Clear** to clear the fields to enter new details.
   You will see a confirmation message box.
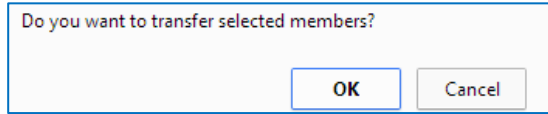
4. Click **Ok**. The page will refresh with the transfer status message.

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 7th 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 **Search**.

> *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.

STEP 4: Mark preparation for new school year as complete

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

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

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