

SchoolSpeak™  
 Quick Review  
 Preparing for the New  
 School Year  
 "Archiving"  
 2021

communitybrands

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### This webinar will cover

- How to work with promotions and outgoing families
- Finalizing and archiving current school year data
- Key term review
- Overview of the Prepare for New School Year admin tool
- Review of archiving process
- Promoting current students and adding new students to classes
- Review Student Transfer and Batch Group Transfer admin tools
- How to work with students/families that have left or graduated
- Overview of Batch Member Withdrawal tool
- Preparing groups for next year
- Options for moving students

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### ✓ When to archive

- Generally recommend at least 10 days or 2 weeks after grades/report cards are final
- Due to virtual/digital learning some schools are allowing students to complete assignments or improve grades past the typical end of school date

**Suggestion – Provide a final date for all grades to be final and then archive**

**End of June/Beginning July**

**Still need to update students/teachers during the summer**

**Don't want to archive the day before school**

June 2021						
S	M	T	W	T	F	S
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

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## Options for archive

Self-archive  
Or  
SchoolSpeak Support Archive

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## ✓ Promotions

- Do this now! Can do before the craziness of the end of the year
- Check your report cards > Settings
  - Verify the Grade for next year – many changes this year!
  - If your school uses the Smart Report Card Template, verify that the promotion setting is checked
  - If your school uses another type of template verify that promotion is ready – it may be automatically on
  - Not required to use it
- When ready for end of year – go to the report card and click into the Final term section
- Choose the correct option for the students
- Auto fill is your friend!

VLIDL Update – Schools may have changed the attendance or reporting for this year. Please try the final report card to verify that the data is displayed correctly.

Turn off automatic pulling of data in the report card settings

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## !Outgoing Students and Families

- Recommend **DO NOT DELETE!!**
- During the year
  - Disable their accounts and move to a withdrawn families group
- End of year
  - Will handle as part of the archive process

If you have opted for SchoolSpeak support to do your archive, the school will still be required to work with outgoing students/families and teachers.

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### Quick Reminders for determining the archive date

- If using daily order (lunch order, extended care) suggest that you run this tool after the end of the month of the last order
  - Last lunch order May 16<sup>th</sup> – May run June 1<sup>st</sup>
  - Last lunch June 1<sup>st</sup> – May run after July 1<sup>st</sup>
- *Why? If the price of lunch or care hours change then the change goes back to first record. Archiving saves the information based on month end dates. We want to make sure that the last entry in the month is set.*
- If planning on Archiving later in summer, please let support know
- **Don't forget the archived data is final!!!**

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### Reminder- Verify that the term dates for your school are correct!

Can use the best "guesstimate" if you don't know the actual dates yet  
Remember Admins can change the dates for the system

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### Before you begin

- ✓ Finalize all gradebooks and report cards
    - Make sure that you have previewed report cards for all students
    - Do a re-preview of report cards
    - **VL/DL –May want to turn off Auto pulling of data if not running final grades**
  - ✓ Review the current groups in your account
    - Note which groups are for the grade level, subject level and other groups
    - Any groups added for VL? Need them for next year?
  - ✓ 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
      - Set grade level – one level below
        - Example Grade Level for New 1 = K
      - New students will be moved after the process is complete
- ! Do not move staff or current year students until after you begin to use Prepare for New School Year admin utility**

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### Don't forget to get the final report cards, final attendance reports, permanent records or transcripts

For students graduating or leaving for permanent file  
For current students' files

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### ✓ Archive and Purge Policy

- Review your archive and purge policy
  - Any new items to save this year?
    - Wellness forms?
    - New Forms?
    - Signups?
    - Additional report cards?

**Suggestion** – Do this step even if SchoolSpeak support is assisting your school in archive process. You know you own data and what you need to save. Review and make changes if you need to! It is easy!

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### 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 UPDATES 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
    - Do NOT clear grade level groups!
  - Promote current students
- **Step 4** – Mark archive process complete
- **Step 5** – Clear any signatures in profiles

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

Don't worry we will break down each step!

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## Reminder Windows

**You have a notification**

Archive Message

You will need to archive 2020 - 21 data and prepare your account for new school year.

[Go to \[Admin\] > Prepare for new school year](#)

[Learn about this process](#)

**ALERT**

You will need to archive 2020 - 21 data and prepare your account for new school year.

[Go to \[Admin\]> Prepare for new school year](#)

[Learn about this process](#)

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If you see a warning message – it is just a reminder that archive must be done after the last day of school

Prepare for new school year: Permissions

**Warning** We recommend archiving at least two weeks after school year as you may need to modify grades and report cards.

[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

#	Description	Archived From	Archived To	Archived On
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### 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
  - Most schools do not make many changes
  - Areas to consider – Donation tracking, announcements, board minutes
- 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

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### 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
- Remember there are no changes to data after this step!

\*\* Let's talk about the dates

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Please verify that all students have report cards previewed or published for the final term of the school year. To confirm, go to **Manage Report Cards** and Select **Preview** next to each class. If any students do not have previewed or published report cards, please preview them before Archiving and Purging. Once the account has been Archived for the 2020 - 2021 school year, it is not possible for Account Administrators to do this.

✓ If you previewed the report cards before starting the Prepare for New School Year you are all set!

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### Important Notes Regarding Archive Date

- Archive Date must be earlier than date you try to run the archive
- **It must be after the last update to report cards and gradebooks**
  - Today's date – June 15<sup>th</sup>
  - Archive Date cannot be past June 15<sup>th</sup>
- 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 15<sup>th</sup> – Data prior to May 31<sup>st</sup> is purged.
    - \*Balances remain
  - To capture June data do archive as of July 1<sup>st</sup>. 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

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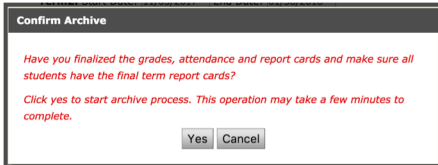
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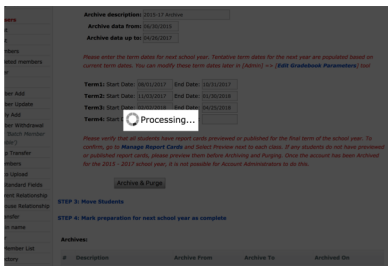
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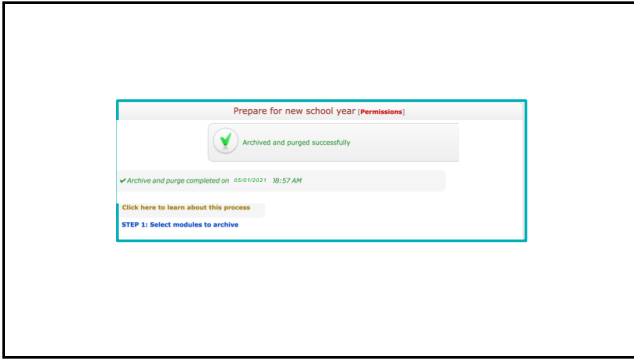
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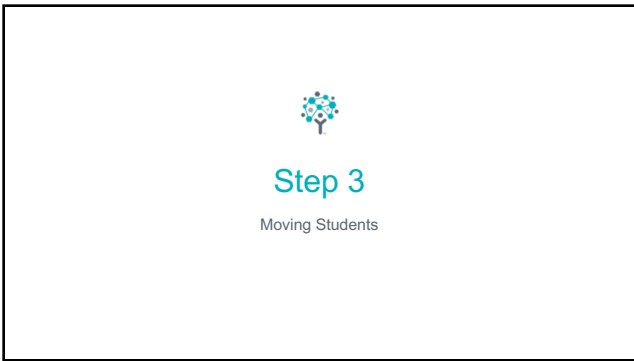
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**Step 3 – Move students – Reminders**

- Tool automatically create new groups for Class of and Left families
- Use Student transfer or batch group transfer to move students
- Promote your students to the next grade level
  - **\*\*Start at the highest grade level in the school and work your way down to the lowest**
    - 8th graders to Class of 2021
    - 7<sup>th</sup> grade to 8<sup>th</sup> grade
    - 6<sup>th</sup> grade to 7<sup>th</sup> grade
  - What happens if you start at K and go up? All of the kiddos will be in the last grade level 8<sup>th</sup> grade 🤔

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• What should I do if I have multiple grade level sections?

- Several options:
  1. Consider **super groups** - If you have multiple grade level sections may move all sections to a general group 5A and 5B to grade 6.
    - Helps with sending grade level emails and announcements
    - Promotes the students but allows you to take time to create sections
    - Can move the students into the correct homeroom later
  2. **Move all of the students into one of the next grade sections**
    - Can move the students to the proper homeroom later
    - If SchoolSpeak support is assisting in your archive – students will be moved into single homeroom. The school will need to move the students to the correct homeroom.
- If not sure yet, this can be done a later time
- Remember that specific subject sections can be adjusted at any time

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✓ **Disable People who have left**

- Don't forget to get the final report cards, final attendance reports, permanent records or transcripts!
- Removing the kiddos and families still need need to have account disabled!!
  - Use **Batch Member Disable after the archive**
    - Once you have moved students and parents into those groups run the tool
    - Will disable the login and remove the members from all other groups
    - Has intelligence to not work on parents that have other children in your school

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**Step 4 – Mark Complete**

- Otherwise the little reminders will continue to display!!

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### Time to clean!

- Go back to your list of groups Admin>>Edit groups
- Clear people in section groups/clubs (yearly groups)
- Clear homerooms if you promoted via a super group
- Delete groups that you don't need
  - Virtual/Digital learning groups
  - Groups for just this year
- Don't delete – Classroom groups (unless virtual and not needed), grade level groups

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### Staff Changes

- Disable the staff person account immediately (even if old admin)
  - Protect your data and account!
- Remember if teachers are moving grade level you cannot just rename grade 8 to grade 2!
  - Report cards are different
  - Gradebooks are different
- Use Member Permissions to 'move' teachers!
- If adding a new admin let SchoolSpeak support know – we will add the new admin to the support site
- If changing person responsible for account contacts – send an email to support

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### Clearing Signatures in Profiles (after archive)

- **New Feature**
- Look at the profiles – are there sections where parents need to agree?
- Are the signatures *old*?
- Can clear the signatures in the profiles automatically with new feature
- Contact SchoolSpeak Support to activate

Auto-clear date and Signature from student profile:  Yes  No [?](#)

Auto-clear date and Signature from student profile:  Yes  No On:  Clear date till:

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- Can also do manually via Manage Members
  - Choose the fields you want to clear
- Do not do until after archive
  - Why? Want to save parent answers for this year!

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### Student Transfer

- Works in 2 modes –
  - Transfer – Moves a student (and guardians) from 1 group to another
  - Copy – Copies students (and guardians) from 1 group to another
- Can see the list of names of students
  - Check/uncheck student names

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### Final thoughts...

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

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Thank you!

If you have any questions, please contact SchoolSpeak support.

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support@schoolspeak.com

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