

## Integris Year End Workshop

It's that time of year again...

Our year end workshops are an invaluable opportunity to perform a 'dry-run' of this annual process away from the pressures of the school office. Sometimes it is merely the prospect of running a year end that can cause additional stress and so one of our key workshop objectives is to promote user confidence and to cement an easy to follow, systematic approach. We encourage all delegates to bring with them a copy of their live school data, so that any specific data queries can be ironed out well in advance of this time-critical event, and all under the watchful eye of our expert trainer. Having already encountered the queries you are likely to raise, they are equipped to share their experience and practical solutions.

In many ways the success of your MIS year end is governed by 12 months of effort in accurately recording and maintaining pupil data. At School Management Solutions we believe strongly that a successful year end sets the right foundation for the school year ahead and it is therefore essential that you prepare adequately and effectively for this most important event in the school calendar.

### What's Covered?

- Taking a closer look - Introducing the year end process
- Managing Leavers
- Controlling the movement of Current Roll Pupils
- Using year end reports to identify final adjustments
- Processing Admissions Pupils
- Now it's your turn - performing a dry run
- Attendance code conventions

### Course Benefits

With the emphasis on hands-on experience, we encourage all delegates to contribute fully to the discussions as we share best practise and identify common mistakes and pitfalls. Other key benefits are summarised as follows:

It raises user confidence and awareness prior to this annual, time-critical event and encourages reciprocal learning within the local school support network.

It empowers delegates to utilise all the system functions and reports available within Integris to most effectively complete the year end process.

It helps to cement a systematic approach to the year end, separating it into a number of sequential events.

It underlines the importance of planning pupil movements before applying these proposed changes to the database, as well as developing the necessary analytical skills that will help delegates to identify and trap errors/queries as they follow through a 'dry run' of the entire year end process.

Through the promotion of good data management, you will get to grips with Common Transfer Files and the role they place within the year end process.

## Course Outline

### Taking a closer look - Introducing the year end process

The year end should be considered as a process-driven event, with a number of key steps to consider along the pathway to success -

- Setting out the order of the year end process
- The importance of taking backups of the database to coincide with the key points in the process
- Discussing how the year end process overlaps with other modules in the Integris suite e.g. Attendance and Timetabling
- Creating a new academic year in the School Diary
- Maintaining the School Diary
- Examining when and how to purge former roll pupils

### Managing Leavers

In this section we will show you how to successfully transfer your leavers onto the former roll -

- Exploring the fields utilised in the movement of leavers together with their expected values
- Creating Common Transfer Format (CTF) files for leavers moving onto other schools
- Dissecting the leavers area

### Controlling the movement of Current Roll Pupils

By far the largest phase in the process, effective planning and preparation are prerequisites for success -

- Sharing best practice for handling current roll pupils
- Assigning pupils a proposed year and class: planning and preparation

- Assigning pupils a proposed year and class: exploring the available methods within Integris
- How do I know that all pupils will move as expected? Carrying out essential checks...
- Moving pupils into their new year groups and classes
- Using year end reports to identify any final adjustments

### Processing Admissions Pupils

It is permissible for all prospective admissions to be added onto the system and to nominate a subset of accepted admissions ready for inclusion onto the current roll -

- Adding new admissions via the 'Student Add' facility
- Adding new admissions batches via the Admin module
- Importing admissions via CTF
- Accepting admissions – exploring which fields are required together with their expected values
- Transferring accepted admissions onto the current roll: when and how?

### 'Now it's your turn' – performing a dry run

- Carrying out the entire process from start to finish
- Troubleshooting along the way

### Attendance Code Conventions

As part of creating your new attendance year we will review the latest DfES-led attendance code revisions and their correct usage -

- Compiling your 'most used' attendance code list
- Revisiting the attendance code guidelines
- Understanding the correct code usage and relevant statutory changes

## Related Courses

Whatever your training requirements we are here to help. For instance, we are very happy to discuss the feasibility of delivering bespoke courses upon request. We also offer a comprehensive two-day foundation course on Integris Admin or a one-day 'essential' guide to the core elements of both Admin and Attendance.

## Contact Us

Should you require further clarification on the course content, or would like to register your interest, please contact our Training Administrator, Susan Marsh, on (01235) 401842 or via e-mail (see address below).