



SIMS

Preparing for the New Financial Year

**Using Nova-T6 and
Options to Prepare the
Timetable**

Preparation Guide

Revision History

Version	Change Description	Date
2022 - 1.0	Initial release.	24/11/2021
2022 - 1.1	Contact information updated.	14/12/2021
2022 - 1.2	Support portal URLs updated.	31/01/2022
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Providing Feedback on Documentation

We always welcome comments and feedback on the quality of our documentation including online help files and handbooks. If you have any comments, feedback or suggestions regarding the module help file, this handbook (PDF file) or any other aspect of our documentation, please email:

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Please ensure that you include the module name, version and aspect of documentation on which you are commenting.

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Intended Audience of this Document

This document provides advice to users who wish to start working on next year's timetable and in particular, the Options process in Options 5 or SIMS Options Offer. It does not cover the end of year processes – only the initial steps in preparing for the next academic year.

A document that provides guidance for schools using SIMS Options Online is available from the support portal (https://customer.support-ess.com/csm?id=kb_article_view&sysparm_article=KB0036186).

IMPORTANT NOTE: Generally, the processes described in this document remain the same each year; they are not specific to a single academic year. The only changes made to this document each year relate to the graphical examples and the sample dates provided in the body of the text. In future years, if you wish to start your preparations for the next academic year before an updated edition of this document is made available, you can use the document prepared for the previous year as a guide, remembering to change the sample dates to those in the forthcoming academic year.

Setting up Academic Information for the New Academic Year

This document provides advice to users who wish to start working on next year's timetable and in particular, the Options process. It does not cover the end of year processes – only the initial steps in preparing for the next academic year.

Before starting work in SIMS Options, there are some setup processes in SIMS and Nova-T6 that need to be carried out. We recommend that the person responsible for SIMS Options consults the System Manager, the Pastoral Manager and the Timetabler for assistance in carrying out the tasks outlined in this chapter. You are strongly advised to take a backup of the SIMS SQL database prior to creating a new academic year.

Following the release of SIMS Options Online, a number of changes will impact this process:

- SIMS Options Online replaces both Options 5 and SIMS Options Offer.
- Once all necessary work in SIMS Options has been completed, the data should be transferred back into SIMS. The new blocks of classes can then be imported into Nova-T6 where they will be integrated with the remainder of the curriculum, in readiness for scheduling.
- There is no longer a requirement to transfer data from SIMS Options Online directly into Nova-T6.

A wide range of documentation is available from within SIMS via the SIMS **Documentation Centre** and can be accessed by clicking the **Documentation** button on the SIMS **Home Page**. The range of documentation includes handbooks, tutorials, mini guides and quick reference sheets. Once open, click the appropriate button (e.g. **Handbooks**), then navigate to the applicable option.

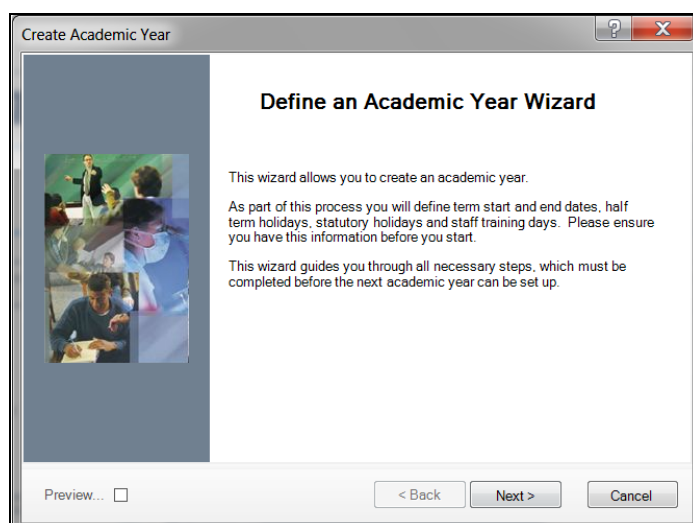
References to any other documents mentioned in this handbook can be accessed from the SIMS **Documentation Centre** unless otherwise specified.

Creating a New Academic Year

Check that the pastoral structure for the current academic year is correct and does not need to be modified for the New Academic Year. This can be achieved by selecting **Focus | School | Pastoral Structure | Current Structure** and should be done before creating a new academic year. If any changes are required, you are strongly advised to make the changes prior to creating the new academic year because next year's pastoral structure is based on this year's structure.

The process of creating a new academic year is very demanding on the SQL server and should be carried out when a minimal number of users are accessing SIMS, ideally when no users are logged on.

1. In SIMS, select **Routines | School | Academic Year** to display the **Define an Academic Year** wizard.



The wizard guides you through the process of creating a new academic year. For more detailed instructions on this process, please refer to the *Creating an Academic Year* chapter in the *Setting Up and Administering SIMS* handbook.

2. Click the **Next** button to continue.
3. Complete the details on the **Define the school working week** page and click the **Next** button to continue.

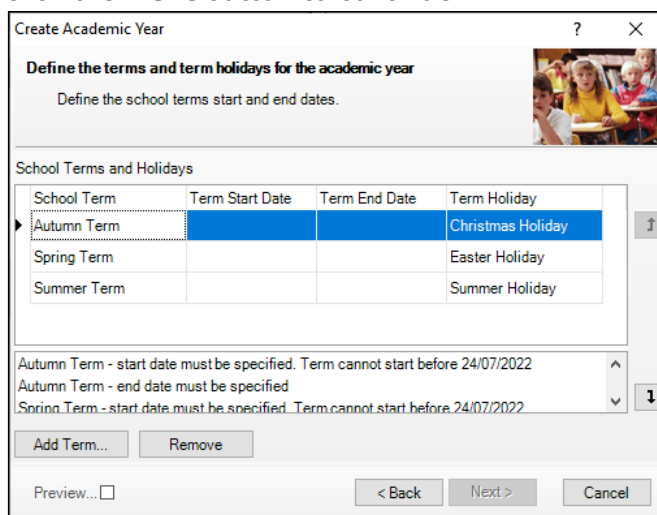


Image: The dates shown in this screenshot are illustrative and are not using current dates

It is not essential to set the dates for half terms, teacher training days or public holidays at this time; these can be added or amended later.

A summary of the details that you have entered is displayed. Check this information carefully before clicking the **Create** button.

4. Select **Tools | System Diagnostics | Database Diagnostics** to display the **Diagnostic Results** page.

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5. Click the **Run** button on the toolbar and then click the **Yes** button to continue.
6. Correct any identified errors before closing the **Diagnostic Results** page.

Setting up Promotion Paths

1. Check that the pastoral structure for the next academic year has been set up (it is not essential for next year's registration groups to be known at this stage). Select **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.

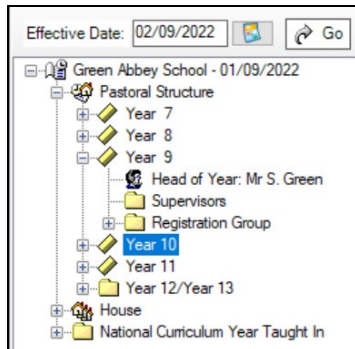


Image: The dates shown in this screenshot are illustrative and are not using current dates

2. To set up the promotion path mapping, select **Routines | School | Promotion** and then click the **Ok** button to prepare the pupil/student data.
3. Click the **Load** button to populate the **Setup Promotion Mapping** dialog. This may take several minutes to populate with data.

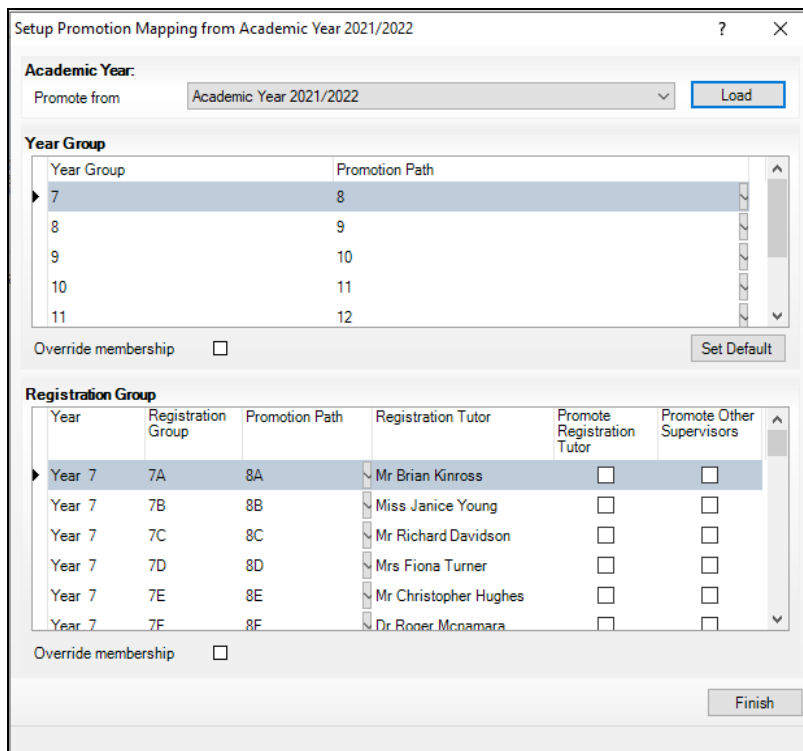


Image: The dates shown in this screenshot are illustrative and are not using current dates

This dialog enables you to map *current* year registration groups to the *next* year registration groups. This can be done later, if necessary.

4. Ensure that the the New Academic Year academic year is selected from the **Promote from** drop-down list.
5. Ensure that both the **Override membership** check boxes are selected. If they are not selected, the promotion will not function correctly (e.g. Year 9 will remain as Year 9, Year 10 will remain as Year 10, etc.).
6. Click the **Finish** button to display the **Promote pastoral groups** page.

Promote pastoral groups					
<input type="button" value="Save"/> <input type="button" value="Map"/> <input type="button" value="Filter"/> <input type="button" value="Customize"/>					
Name	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group
+ Current Year Group: 7					
+ Current Year Group: 8					
- Current Year Group: 9					
Abbot, Hannah	<input type="checkbox"/>	9	10	9B	10B
Adams, Melanie	<input type="checkbox"/>	9	10	9D	10D
Adkins, Richard	<input type="checkbox"/>	9	10	9E	10E
Ainsworth, Alison	<input type="checkbox"/>	9	10	9C	10C
Andrews, Bethany	<input type="checkbox"/>	9	10	9E	10E
Aperen, Alex	<input type="checkbox"/>	9	10	9E	10E
Ashworth, Imogen	<input type="checkbox"/>	9	10	9C	10C
Atkinson, Bridget	<input type="checkbox"/>	9	10	9F	10F
Austin, Shannon	<input type="checkbox"/>	9	10	9D	10D
Barbut, Rachel	<input type="checkbox"/>	9	10	9B	10B
Barnard, Andrew	<input type="checkbox"/>	9	10	9E	10E
Barnstable, Tracy	<input type="checkbox"/>	9	10	9D	10D
Berrett, Rhys	<input type="checkbox"/>	9	10	9D	10D
Bond, Craig	<input type="checkbox"/>	9	10	9A	10A

If required, individual pupil/student changes can be made in this screen. Registration groups can be edited at a later date because they are not needed for the Options process.

For SIMS Options to operate successfully, it is necessary only to make sure that pupil/students are correctly promoted into years for which Options will be used, e.g. make sure that the current Year 9 are correctly promoted to Year 10. The allocation of registration groups can be tidied up later.

7. Click the **Save** button to save any changes.

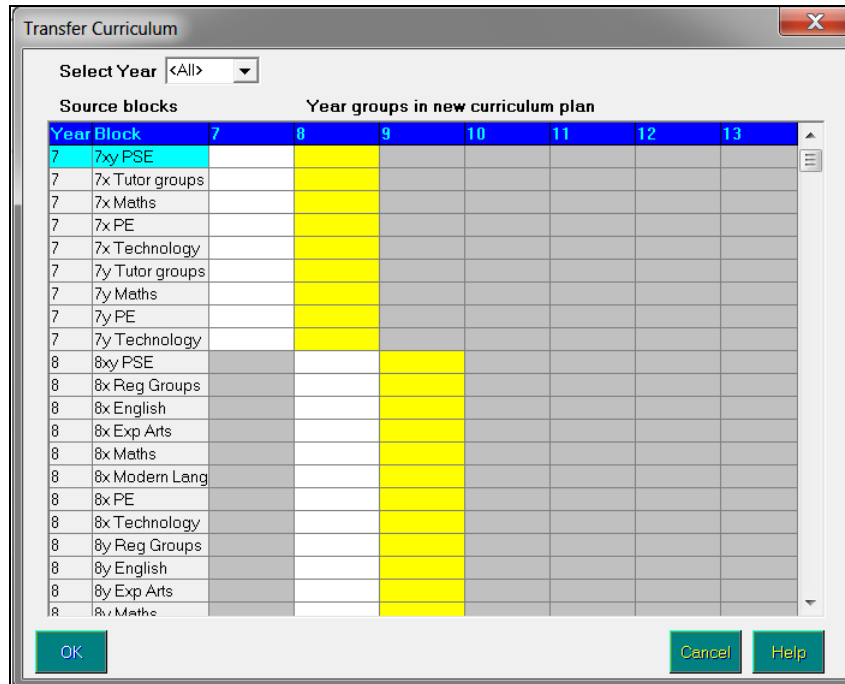
Creating a Data Set for Next Year in Nova-T6

1. Run Nova-T6.
2. Load a data set containing the current timetable (i.e. for the 2021/22 academic year).

NOTE: It is important that this is not a maintenance data set or a frozen data set.

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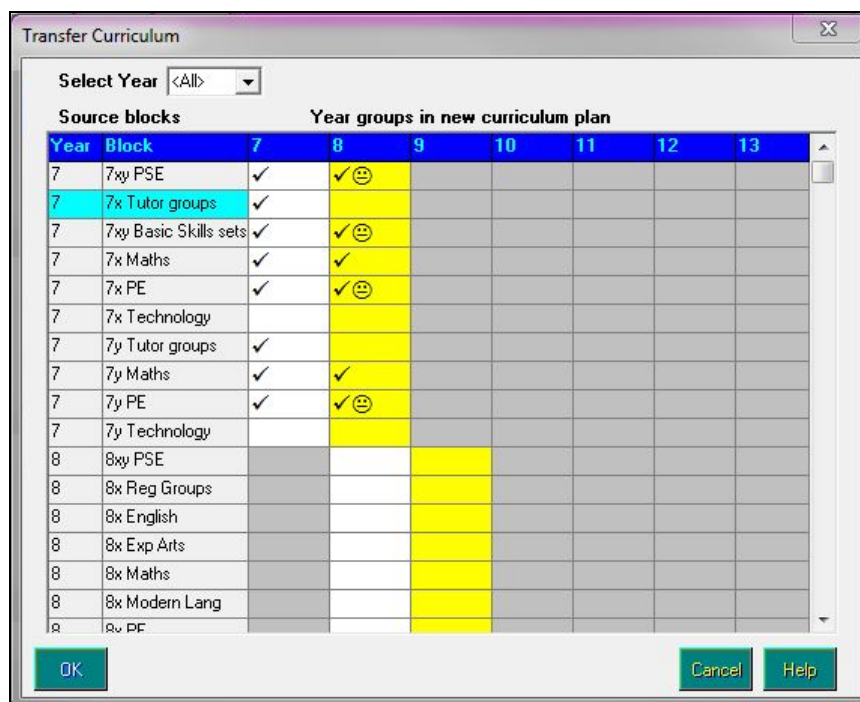
3. Select **Data | Transfer Curriculum** to display the **Transfer Curriculum** dialog.



All of the blocks in the curriculum plan are displayed but the list can be filtered by selecting an item from the **Select Year** drop-down list. The most likely columns for receiving transfers are coloured white (for moving across) and yellow (for moving up). A block may be transferred to any or all year groups, including grey ones.

4. A block and its classes can be copied without their attributes (teachers, and rooms, if any). Click a white cell to copy the block into the same year group for next year or click a yellow cell to copy the block into the next year group up (e.g. this year's Year 7 into next year's Year 8).

- A block and its classes can be copied, together with their assigned teachers (and rooms, if any). Click twice on a cell. Clicking into a cell places a 'tick', a second click adds a 'face' and a further click removes everything from the cell.



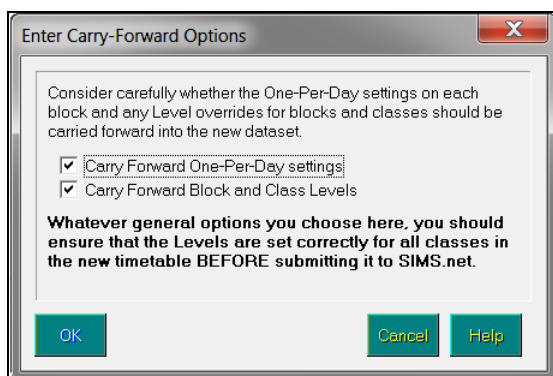
Right-clicking a cell removes its contents. The 'tick' indicates that the block is copied. The 'face' indicates that both staff and rooms (attached to classes in the curriculum plan) are also included. An example is shown in the previous graphic.

*NOTE: The **Shift** key can be used to mark for transfer a series of blocks.*

- When you have set up all the required transfers, click the **OK** button to display the **Enter Carry-Forward Options** dialog. It is now possible for the One-Per-Day settings of a block to be carried forward to a new dataset (via **Data | Transfer Curriculum**). It is also possible for block and class levels to be carried forward to a new dataset.

IMPORTANT NOTES: All classes, and particularly classes for Years 12 and 13, must have the correct levels assigned to them. These details must be transferred to SQL before the start of the academic year.

Please consult the Examinations Officer, the Returns Officer and the staff members responsible for Course Manager regarding the allocation of levels to classes.



7. The new dataset is given the default name of <NoName>. You should save this dataset with a new, appropriate name, e.g. 2022-23A.

If you are using a copy of this year's dataset instead of using the Transfer Curriculum routine, you must run **Tools | Remove SQL Links**.

Preparing the Curriculum Structures in SIMS

1. In Nova-T6, ensure that the band structure for each year, as displayed on the **Model** screen, is what the Timetabler intends. Years exist only where they have been set up by the Transfer Curriculum routine. Typically, these do not include Years 10 and 12. You must create any 'missing years' in the usual way (via the **Model** screen, so that you can create their band structure).
2. For each year in which you will be using Options (e.g. Year 10), create empty Options blocks with single-letter identifiers on the **Model** screen.

NOTES: You are strongly advised to take a backup of SIMS before proceeding.

Please take particular care when selecting dates.

3. Transfer the band structure to SQL by selecting **Data | Export Curriculum and Timetable to SQL**. If you are preparing to use Options, select the **Export Band structure only** check box. The **Start Date** should be the start date for the working academic year and the **End Date** should be the end date of the working academic year, i.e. the last day of the Summer term.

A warning message is displayed when the **Export Band structure only** check box is selected. Ensure this is the correct action before proceeding.

NOTES: Ensure that the **Today** check box is deselected. If an early transfer to SQL is being performed for the benefit of Options, selecting the **Export Band structure only** check box avoids the transfer of the full curriculum plan when this would be premature. This check box should not be selected at any other time.

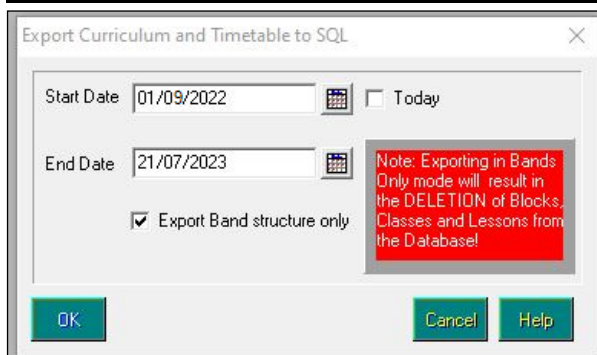


Image: The dates shown in this screenshot are illustrative and are not using current dates

4. Click the **OK** button to display the **Curriculum Matching** wizard. For information on using this wizard, please refer to the *Nova-T Links* chapter of the *Maintaining Nova* handbook.
5. Close Nova-T6.

NOTE: The band names specified in Nova-T6 should not be changed during the Options process. If you want to change the names of bands, this can be done after student allocations have been exported from Options to SQL.

In SIMS

The following steps describe how to assign pupil/students to bands for the next academic year.

1. Switch to the next academic year by selecting **Tools | Academic Management | Set Academic Year**. It is also possible to select the academic year using the date selector on the SIMS **Home Page** (via **Focus | Home Page**).

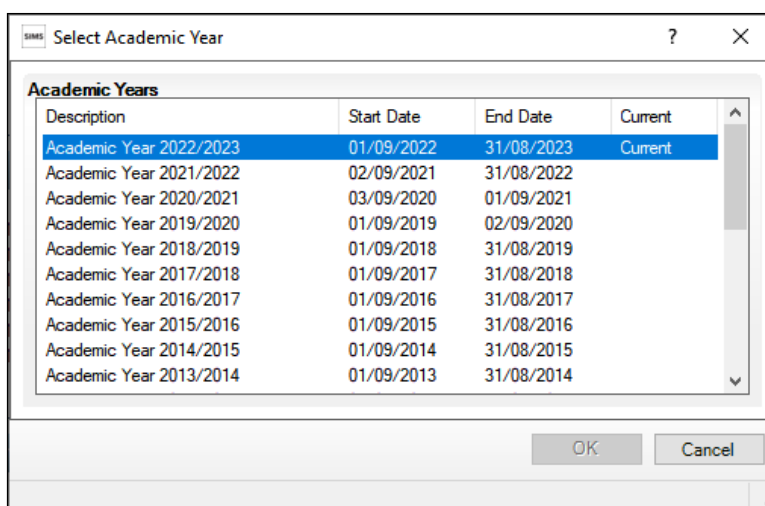


Image: The dates shown in this screenshot are illustrative and are not using current dates

2. Highlight the new **Academic Year** and click the **OK** button.

NOTE: Setting an academic year works on a per user basis, regardless of the workstation used.

Placing Pupil/Student in Bands

1. Select **Focus | School | Academic Structure | Curriculum Assignment by Scheme** to display the **Find Curriculum Scheme** browser.
2. Click the **Search** button to display the curriculum structure that you have just transferred from Nova-T6. Open **Base bands in Year 10** to display the **Select Effective Date Range** dialog.

Academic Year 2022/2023	
Named Date Range	
Name	Date Range
Academic Year 2022/2023	01/09/2022 - 31/08/2023
<Working Academic Year>	01/09/2022 - 31/08/2023
<Autumn Term+Christmas Holiday>	01/09/2022 - 03/01/2023
<Spring Term+Easter Holiday>	04/01/2023 - 17/04/2023
<Summer Term+Summer Holiday>	18/04/2023 - 31/08/2023

Custom Date Range From: 02/09/2022 To: 27/07/2023

Restrict date range from today to end
 Don't ask me again (this session or until manually changed)

OK Cancel

Image: The dates shown in this screenshot are illustrative and are not using current dates

3. Select the working academic year as the Effective Date Range and click the **OK** button to display the **Group Memberships in Scheme** page. Make a note of the date range because you will need to enter it in Options later.

NOTE: If you previously transferred only bands from Nova-T6 as part of the SQL Transfer, only the base band schemes are displayed in the browser. This is normal behaviour.

Student Name	Reg Group	Assigned	Re	10x	10y
<input checked="" type="checkbox"/> Adams, Adam	9A	10x		✓	
<input type="checkbox"/> Ashdown, Rae	9B	10x		✓	
<input type="checkbox"/> Badger, David	9C	10y			✓
<input type="checkbox"/> Bailey, Gareth	9D	10y			✓
<input type="checkbox"/> Bailey, Liam	9E	10x		✓	
<input type="checkbox"/> Bains, Kirk	9F	10y			✓
<input type="checkbox"/> Baker, Jordan	9F	10x		✓	
<input type="checkbox"/> Bellic, Nico	9D	10x		✓	
<input type="checkbox"/> Bellic, Roman	9C	10x		✓	

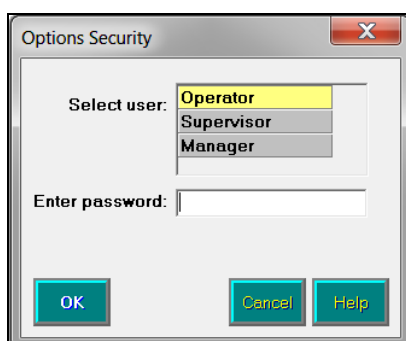
Image: The dates shown in this screenshot are illustrative and are not using current dates

The students in Year 10 (for example) and their current registration groups (i.e. in Year 9) are displayed in a grid, together with columns for each of the bands.

- All potential students for Year 10 (for example) must be assigned to a band by placing 'ticks' in the grid, even if Option blocks are not band specific.
- Click the **Save** button.

Setting up a New Implementation in Options

- Select **Focus | Options** in SIMS to display the **Options Security** dialog.



- Select **Manager** as the user. The password should be left blank when you first access Options (if required, set a password by selecting **System | Passwords**). Click the **OK** button.

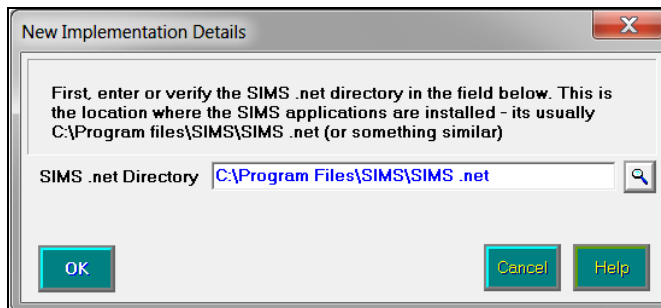
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3. Create a new implementation by selecting **Tools | Implementation Manager** to display the **Implementation Manager** dialog.



Image: The dates shown in this screenshot are illustrative and are not using current dates

4. Click the **Create New** button to display the **New Implementation Details** dialog.



5. Click the **Field Browser** button and navigate to the location of the **SIMS .net Directory**.
6. Click the **OK** button to display the **Implementation Details** dialog.

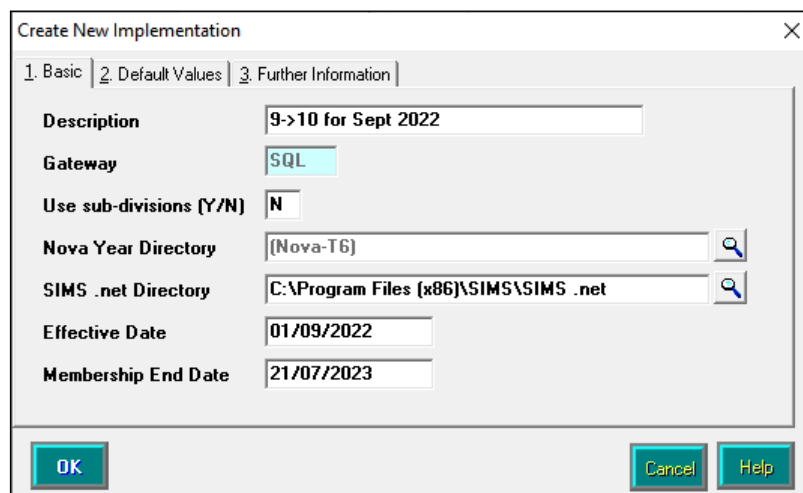


Image: The dates shown in this screenshot are illustrative and are not using current dates

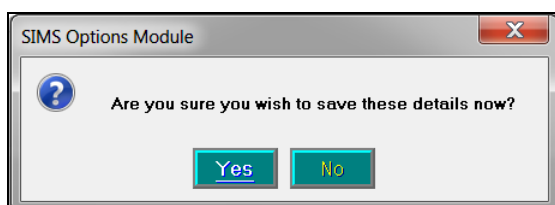
Once the location of the **SIMS .net Directory** is confirmed, the **Gateway** field defaults to **SQL** and the **Nova Year Directory** field defaults to **(Nova-T6)**. This information cannot be changed.

7. Enter a unique **Description**.

The **Effective Date** must match the start date of the student memberships of base bands in Year 10 and should be the start date of the working academic year.

The **Membership End Date** should be the end date of the working academic year.

8. Click the **OK** button.



9. Click the **Yes** button to save the implementation.
10. In the **Implementation Manager** dialog, highlight the new implementation and click the **Select** button.

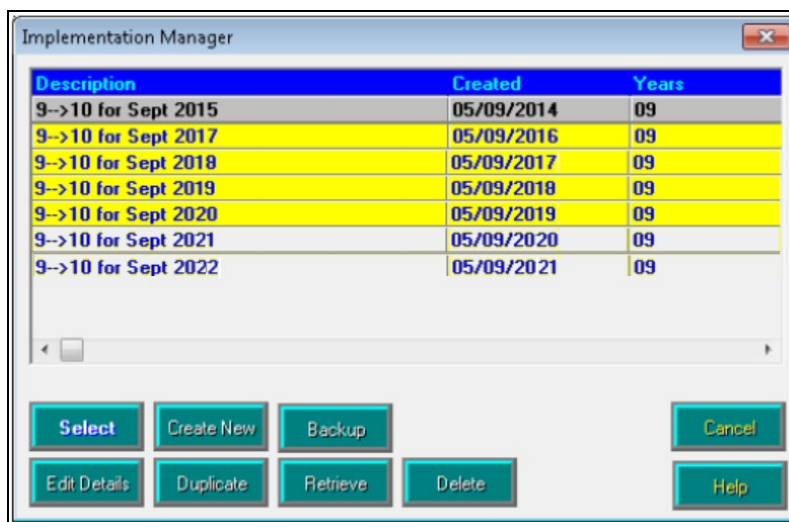
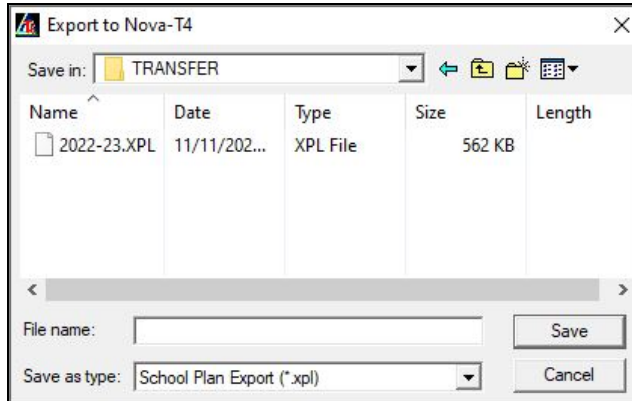


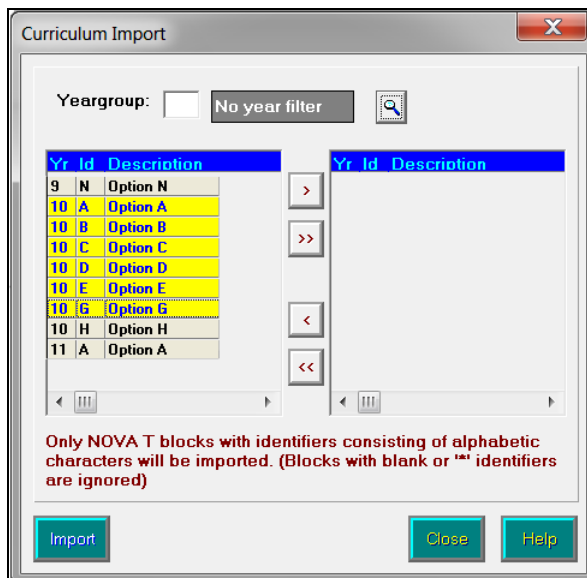
Image: The dates shown in this screenshot are illustrative and are not using current dates

Importing Curriculum Data from Nova-T6 into Options

1. In Nova-T6, in the newly created .SPL file, create a transfer file (.XPL) by selecting **Data | Export to Nova-T4 / Options**.

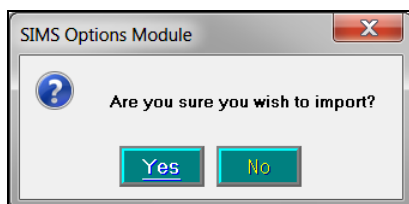


2. Enter an appropriate **File name** and click the **Save** button.
3. In Options, open this file by selecting **Tools | Transfers | Import Curriculum from Nova-T6**.
4. Highlight the **Name** of the .XPL file and click the **Open** button.
The only blocks available are those with a letter block identifier.

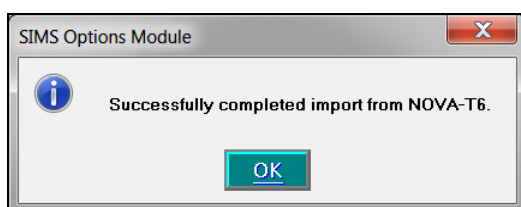


5. Highlight the blocks to be used in your Options implementation and click the single arrow button to select them for import.
To aid selection, select the **Yeargroup** filter. Only blocks associated with the required year group are displayed.

- When you have selected all the required blocks, click the **Import** button.



- Click the **Yes** button to confirm that you want to import the curriculum data. When the import has completed successfully, a confirmation dialog is displayed.

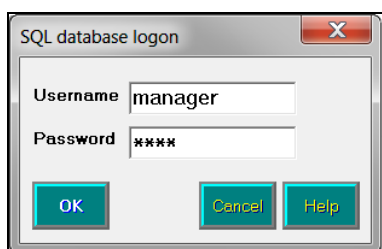


- Click the **OK** button to continue.

Importing Students from SQL into Options

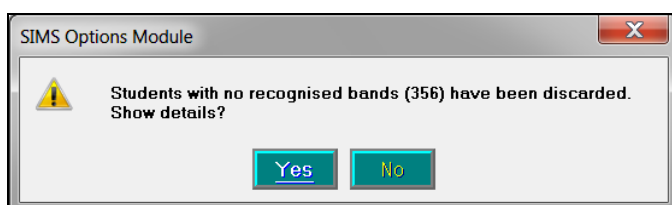
All students with appropriate band memberships can be imported from SQL. This includes guest students and pre-admissions, as well as students who are currently on-roll.

- In Options, select **Tools | Transfers | Import Students** to display the **SQL database logon** dialog.

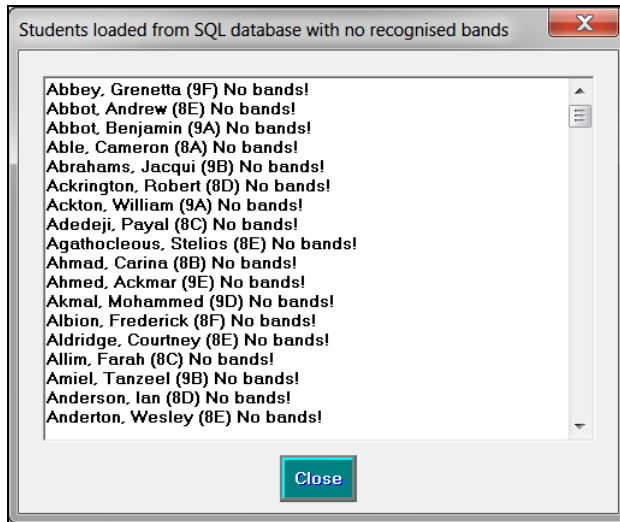


- Enter the **Username** and **Password** of a user with Timetabler or Curricular Manager permissions.
- Click the **OK** button.

A warning message reminds you that only students who have been assigned to a band are displayed.

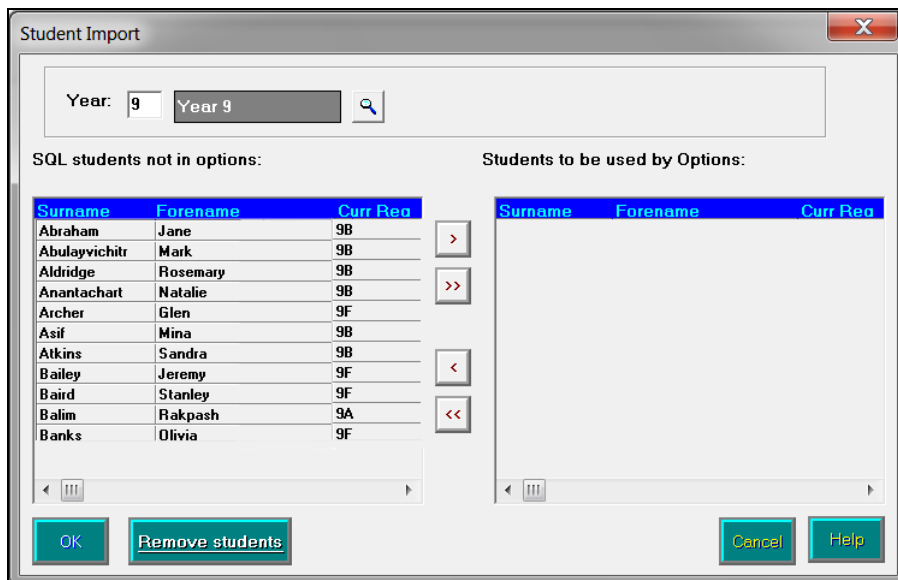


- Click the **No** button to proceed to the **Student Import** chooser, or click the **Yes** button to view a list of students with no recognised bands.



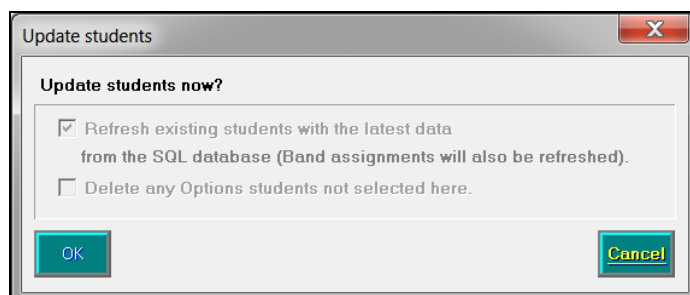
*NOTE: You are advised to click the **Yes** button to view the report and confirm that the students involved in the Options process have not been discarded. Click the **Close** button on the notification dialog when you are ready to proceed.*

- Click the **Yes** button to display the **Student Import** dialog.



- Select the **Year** filter to identify students of the required years (e.g. current Year 9) by clicking the **Field Browser** button adjacent to the **Year** field and selecting from the drop-down list.

- Having selected the required students to be used in Options (using the buttons in the centre of the chooser), click the **OK** button to confirm the selection and to display the **Update students** dialog. This dialog is greyed out on first import.



- Click the **OK** button to complete the process.
You can now work on the implementation in the same way as in previous years.

Exporting Newly Created Classes from Options to Nova-T6

It is usual for the Timetabler to create all the classes in the Options block manually in Nova-T6 before the Options process is complete. These classes correspond with those that have been created automatically in SIMS Options. Where this is the case, you do not need to export the classes from Options.

However, if the Options blocks in Nova-T6 are empty, the newly created classes should be exported from SIMS Options into Nova-T6.

This process transfers the newly created classes from Options into corresponding Option blocks in Nova-T6.

- In Options, select **Tools | Transfers | Export MOD File to Nova-T6**. You are prompted to select a year for export, and to indicate where the .MOD file should be saved. A filename is suggested but this can be changed, if required.
- Open Nova-T6 and load the new academic year dataset.
- In the **Model** screen in Nova-T6, click the **Recall** button and select to merge the .MOD file in.

Updating the Curriculum Structure in SQL

The classes that were created in Options and transferred to Nova-T6 need to be transferred to SIMS. This enables the student allocations to be matched to the classes in SIMS.

IMPORTANT NOTE: Always make a backup in SIMS before exporting the curriculum.

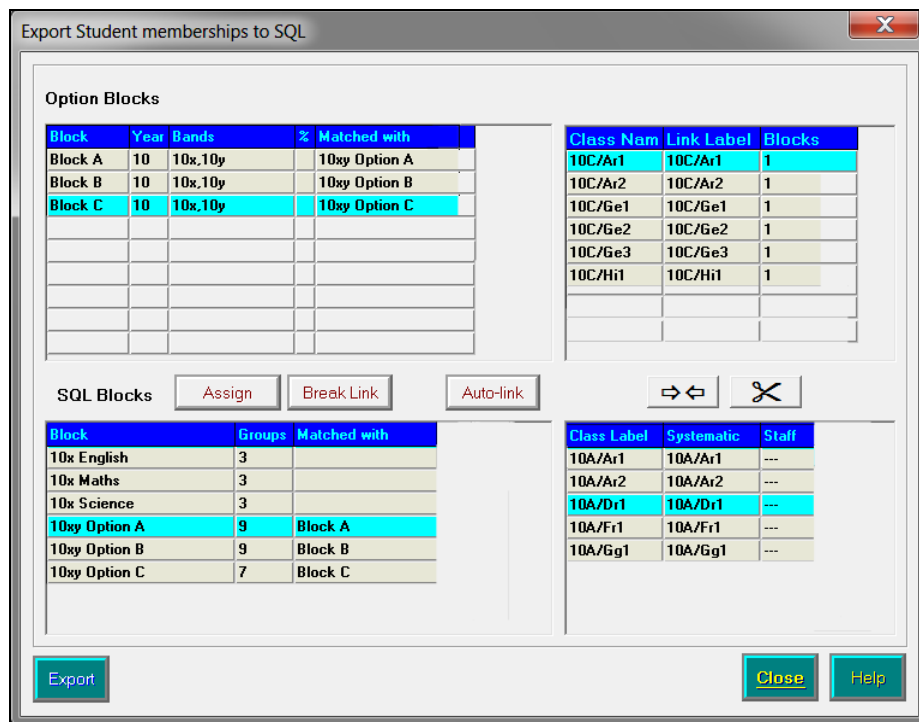
- In Nova-T6, select **Data | Export Curriculum and Timetable to SQL** to display the **Export Curriculum and Timetable to SQL** dialog.

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2. Ensure that the **Start Date** and **End Date** relate to the last academic year, and that the **Today** and **Export Band structure only** check boxes are deselected.
3. Click the **OK** button to display the **Curriculum Matching** wizard. For information on using this wizard, please refer to the *Nova-T Links* chapter of the *Maintaining Nova* handbook.
4. In SIMS, set the academic year to the new academic year by selecting **Tools | Academic Management | Set Academic Year** (or from the SIMS **Home Page**) and review the changes.

Exporting Student Data to SQL

1. In Options, select **Tools | Transfers | Export Student Allocations** to display the **SQL database logon** dialog.
2. Enter your **Username** and **Password** and click the **OK** button to display the **Export Student memberships to SQL** dialog. This dialog is disabled initially while class information is retrieved from the SQL database.



To enable Options to link corresponding blocks automatically, click the **Auto-link** button. This is the recommended option. The other options are required if Auto Link fails.

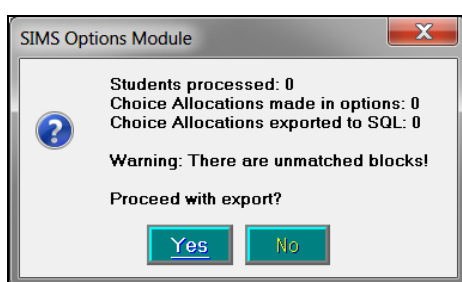
- To link corresponding blocks, select the required **Options Blocks** from the top half of the dialog, then the corresponding **SQL Blocks** from the bottom half of the dialog. Click the **Assign** button.
- To break the link between corresponding blocks, repeat the previous process but click the **Break Link** button instead of the **Assign** button.

NOTE: An Option block can be linked to only one SQL block at a time, and vice versa. Attempts to associate a block that is already linked with a new block will break the previous link.

If the date range defined for the Options implementation lies outside the date range of the classes that were exported from Nova-T6 to SQL, the blocks will not match and the export will not run.

When you are satisfied with the associations made between the blocks in Options and the blocks in SQL, you can proceed.

3. Click the **Export** button to display the **SIMS Options Module** dialog, which displays information about the number of students being processed and, if there are any unlinked blocks, a warning.



4. Click the **Yes** button to proceed with the export. If you click the **No** button, the **Export Student Membership** dialog will be displayed, where you can link any unlinked blocks before running the export again.

*NOTE: If the **Effective Date** and **Membership End Date** used in the implementation do not lie within the same academic year, you are informed that the date ranges do not match.*

02 | Summary of Processes

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Summary of Processes Check List

This section provides a summary of the processes described earlier in this document.

In SIMS:

Complete	Task Description
<input type="checkbox"/>	Back up the SIMS SQL database.
<input type="checkbox"/>	Check that the pastoral structure for the current academic year is correct.
<input type="checkbox"/>	Create a new academic year (via Routines School Academic Year).
<input type="checkbox"/>	In SIMS, run the SIMS Database Validator (via Tools System Diagnostics Database Diagnostics).
<input type="checkbox"/>	Check that the pastoral structure for next year has been defined correctly (via Focus School Pastoral Structure Next Academic Year Structure).
<input type="checkbox"/>	Set the promotion paths (via Routines School Promotion).

In Nova-T6:

Complete	Task Description
<input type="checkbox"/>	Transfer elements of the previous data set into a new academic year directory (via Data Transfer Curriculum).
<input type="checkbox"/>	Save the new data set, create any 'missing' year groups and ensure that the bands in Year 10 are as intended and that the block identifiers for the Option blocks are single letters (<u>not</u> numbers, asterisks or blank).
<input type="checkbox"/>	Send the curriculum and timetable to SQL using the Nova/SQL Transfer wizard, remembering to use an appropriate date range (the start date must be the start date for the working academic year and the end date should be the date of the last day of the Summer term). Send 'bands only' if all you want to do at this stage is to prepare to use Options.
<input type="checkbox"/>	Close Nova-T6.

In SIMS:

Complete	Task Description
<input type="checkbox"/>	Change to the next academic year (via Tools Academic Management Set Academic Year or via the SIMS Home Page).
<input type="checkbox"/>	Select a scheme, e.g. Base bands in Year 10 (via Focus School Academic Structure Curriculum Assignment by Scheme).
<input type="checkbox"/>	Select the working academic year as the Effective Date Range.
<input type="checkbox"/>	Place the current students (e.g. those in Year 9) in their appropriate band for the required year (e.g. Year 10). Remember to Save the banding changes.

In Options:

Complete	Task Description
<input type="checkbox"/>	Create a new implementation using the SQL gateway (via Tools Implementation Manager).
<input type="checkbox"/>	Select the new implementation.
<input type="checkbox"/>	Import the curriculum into Options (via Tools Transfers Import Curriculum from Nova-T6).
<input type="checkbox"/>	Import students from SQL into Options (via Tools Transfers Import Students).
<input type="checkbox"/>	Export the newly created classes from Options to Nova-T6 (via Tools Transfers Export MOD File to Nova-T6).

In Nova-T6

Complete	Task Description
<input type="checkbox"/>	Update the curriculum structure in SQL (via Data Export Curriculum and Timetable to SQL) and complete the Nova/SQL Transfer wizard.

In Options:

Complete	Task Description
<input type="checkbox"/>	Export the student data to SQL (via Tools Transfers Export Student Allocations).