

End of Year Procedure Guide 2024/25 for Secondary Schools



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Bromcom MIS End of Year Procedure

THE EXAMPLES AND SCREENSHOTS IN THIS GUIDE ARE FOR ILLUSTRATION PURPOSES ONLY AND MAY DIFFER TO YOUR SCHOOL

Basic Guidelines

Make sure that you have the necessary permissions to all the relevant menu items. An **Administrator** will have access by default

This procedure can be undertaken at any point in the current **Academic Year**, but it is best to wait until the information that you are entering is no longer subject to change.

There is no **End of Year** application to be run as such. The **End of Year** procedure consists of creating and configuring the various **Curriculum** and **Calendar** components that make up the forthcoming **Academic School Year**. Follow all the steps appropriate for your system, in sequence.

Preparing for the End-of-Year

It is recommended that you first **tidy up the current Academic Year**.

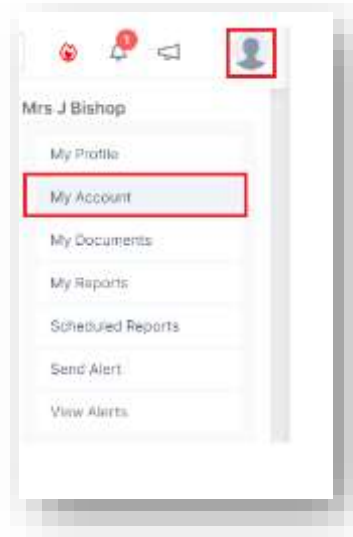
Check with your colleagues what they want to carry through from the current **Academic Year** to the next.

- Will the **Heads of Year** (or their equivalent) and other staff associated with the **Year**, be promoted with their **Year Group**?
- What will this year's **Tutor Groups** be called next year? Will they have the same **House, Staff** and/or **Room** associated with them?
- Have you checked the end dates of your current **Classes** and **Tutor Groups**? All **Teaching Classes** must have an end date **before the end of the current academic year**. If you need to edit your **Teaching Classes** and group end dates, please read the following guide: [How to bulk edit group end dates](#). If your **Tutor Group** names are changing, then they must have an end date before the start of the next academic year. If they are staying the same and being reused, then there is no need to add end dates to your **Tutor Groups**. **Please Note:** If you are using **Google/Office 365 Integration** you **MUST End Date** all **Tutor Groups**.

Interval Setting for the End-of-Year.

Ensure your **Current Interval** on the **My Account** page is set to **Nucleus**, that way you will have access to all **Academic Years** including the new one when you create it.

To change this setting, click on your **Profile Menu** in the top right of your Bromcom screen and then click on **My Account** in the dropdown menu.



The **Interval** can be changed to **Nucleus**, if needed, within the **General Panel** using the **Current Interval** drop down. Click **Save** in the top left hand corner.



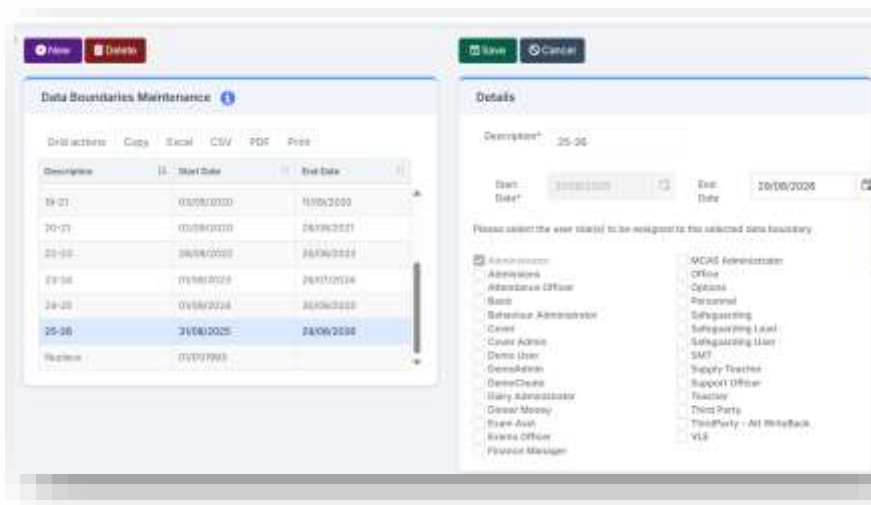
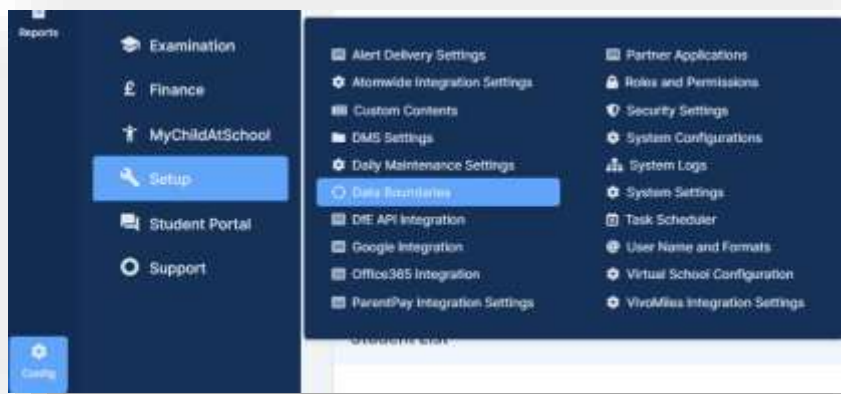
The list of **Current Intervals** you see in the above screenshot are what we call **Data Boundaries**.

Data Boundaries

You may find using a **Data Boundary** (also known as an **Interval**) helpful during the end of year process, as it enables you to work within the date range of the new academic year alone. Therefore, any changes you make will not have an effect on the current academic year. This is particularly useful/important when making changes to areas such as **Behaviour** and **Curriculum** for example.

- **Behaviour Detentions:** as there is no date range within detentions. I.e., you cannot say that you want a detention schedule used for this point in time in the future. If you are making changes to configurations at the **End Of Year** ready for September, then any changes you make to the detention schedules happen immediately, which would affect any detentions in July. The way to avoid this is to put yourself in a **Data Boundary** for next academic year, make your changes and then return back to the **Nucleus** afterwards.
- **Timetable:** you may wish to work in a **Data Boundary** for the new academic year to easily work with next years classes rather than having to alter the active on date in various screens, etc.
- **Census:** You may need to use a data boundary if you need to update a previous years **Learner Funding and Monitoring hours**.

You can create a **Data Boundary** via **Config>Setup>Data Boundaries**



For more information see [How to Manage Data Boundaries](#)

If you decide to use a **Data Boundary**, once you have created it for **2025/2026** you can associate this to your **user Account** via **My Account>General>Current Interval**.

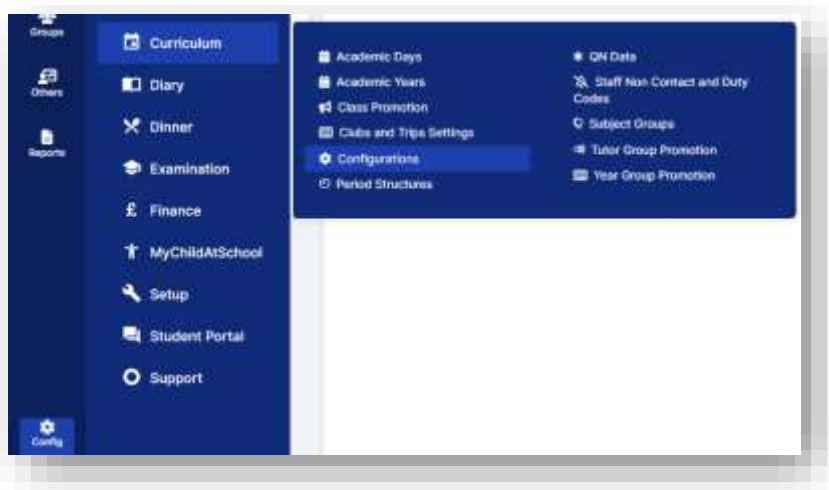
Once you have completed your changes to the new academic year, please ensure you remove this data boundary and set your account back to using the **Nucleus** interval to avoid any issues going forward.

Creating a New Period Structure

You only need to complete this section if you plan to use a **DIFFERENT Period Structure** next year, for example if you are changing the shape of the school day or moving to a 2-week timetable, etc. Otherwise, you can **skip this step** and continue to [Creating a New Academic Year](#) .

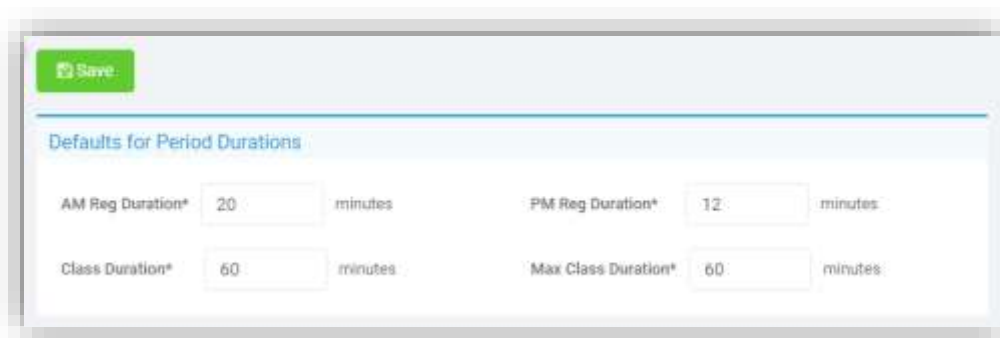
IMPORTANT: If you use detentions and you create a new period structure, you will need to set up the detention scheduling again for the new academic year. See [How to Schedule Detentions](#)

Go to **Config>Curriculum>Configurations**.



This will open the **Defaults for Period Durations** panel. Check these and if necessary, adjust them.

Set the global configurations for: **AM**, **PM**, and **Class Periods**

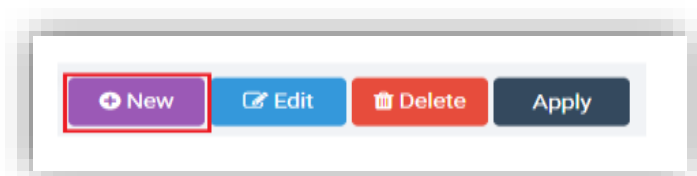


Don't worry - Any changes made on this screen **will not** affect the current year's data.

The **Class Duration** refers to the length of the **Period** and the **Max Class Duration** refers to the maximum length a **Period** can be. For example, each **Period** of the day may have a duration of 40 minutes, but the last **Period** on Friday may be 60 minutes. Therefore, the **Class Duration** would be 40 and the **Max Class Duration** would be 60, allowing for a **Period** up to 60 minutes.

Click on **SAVE** to save any changes.

Then go to **Config>Curriculum>Period Structures** and click on the **New** button.



This will open the **Create Period Structure** page. Below is an **example** of what a **1-week Period Structure** may look like.

A screenshot of the 'Create Period Structure' form. The form includes the following fields: 'Period Structure Name*' with the value '2025-26'; 'Morning Begins*' with the value '08:45'; 'Afternoon Begins*' with the value '13:30'; 'No. of weeks' with a dropdown menu set to '1'; 'Week 1*' with checkboxes for 'Mon', 'Tue', 'Wed', 'Thu', 'Fri', 'Sat', and 'Sun', where 'Mon' through 'Fri' are checked; 'Days in timetable cycle*' with the value '5'; and 'Available From*' with the value '08/05/2025'. At the bottom, there are 'Next' and 'Close' buttons.

- **Period Structure Name***: Give your new structure a **name** which must be unique, for example 1 Week 6 Period.
- **Morning Begins*/Afternoon Begins***: Set the start time of the **morning and afternoon** sessions; this will be the time the first session of the morning and afternoon begin. This will be the **AM** and **PM Registration** sessions.
- **No of weeks**: Set the **number of weeks** (using the drop-down choices) that will exist in your **Timetable Cycle** for example, a 10-day timetable cycle that runs Monday-Friday is a **2-week** cycle (Monday to Friday week 1, followed by Monday to Friday week 2).

- **Days of the Week:** Once you have selected the number of **weeks**, you should put a tick in the boxes of the days that are part of the cycle to mark them as **Academic Days**.

Below is an **example** of what a **2-week Period Structure** may look like.

Enter the number of **Days in Timetable Cycle***

The **Days in the timetable cycle*** box should usually contain the number of **Academic Days** in your timetable cycle as defined above (e.g., **10** in the example above). It can sometimes be different so if you are unsure of what to put in this field then please contact the Helpdesk for advice.

Available From*: If you are performing your **End of Year** process before the start of your new **Academic Year**, the date can be left as today's date (it will not affect the current **Academic Calendar**), as it will allow changes to be made. If a later date is used, you will not be able to see this model until the date entered. Click on the **Next** button.

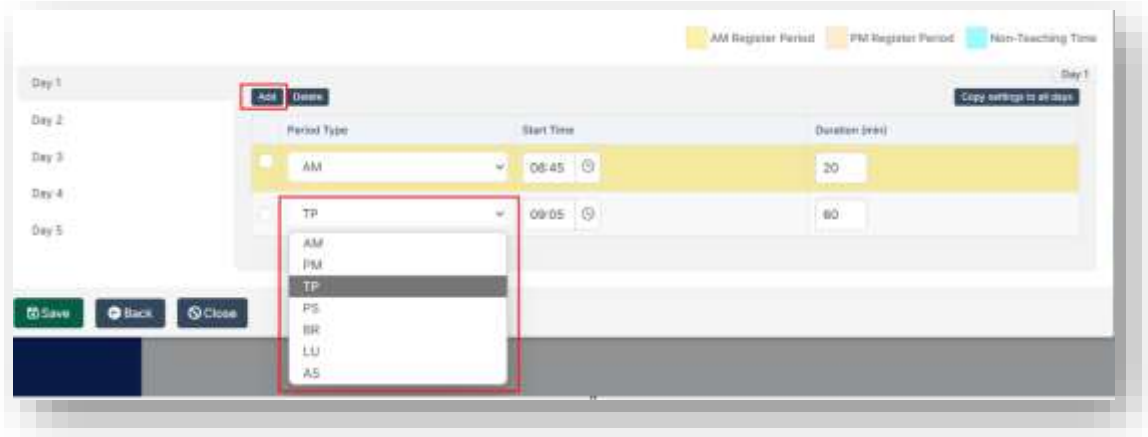
Once you click on **Next**, this will open the **Create Timetable Day Structure** page where you create the **Period Structure** of the day, including the AM position and duration, number of morning sessions, **PM** position and duration, **Lunches** and **Breaks** etc.

Click the **Add** button to increase the number of available **Periods** – and use the **Period Type** dropdown menu to select the type of **Period**.

- **BR = Break**
- **LU= Lunch**
- **AS = After School**

- PS = Pre School
- AM, PM = Registration
- TP = Teaching Period

Note: new **Periods** added will default to **TP (Teaching Period)** but can be changed using the dropdown. You can edit the duration of each session, and the times will adjust but please note that the **times must not overlap**.



RECOMMENDED!



Please define your **Breaks (BR)**, **Lunch (LU)**, **Pre-School (PS)** and **After School Sessions (AS)**. You will need them if you want to schedule detentions outside of normal teaching periods (e.g., after school) or you if want to timetable a teacher to do lunchtime duty.

Please remember to adhere to the **Period** durations set in the configurations earlier on, as well as the morning and afternoon begin times.

You **must have an AM and PM session for each day within your period structure**, even if students don't attend morning and/or afternoon registration. If you are unsure about this, please contact the **Bromcom Helpdesk**.

The checkbox to **Copy settings to all days** of the Timetable Cycle is to save you having to set this up for each day where it is the same as **Day 1**. Tick this box and then the completed day is then copied to all the days in your **Timetable Cycle**.



If one day of the cycle is different e.g., you finish early on a Friday for Staff Meetings, then amend the appropriate days (Days 5 and 10 in this case as we have a 2 Week Timetable).

Once you have completed building your Period Structure, click the **Save** button if the settings are correct.

You will then be automatically returned to the **Period Structures Page**, where you can then edit the new **Period Structure** to re-name the **Periods** if required.

If you have made changes to your period structure for the new Academic Year, then please check to ensure all the parameters under **Config>Attendance>Register Update Parameters** are still valid. For instance, it would be difficult to update the PM register from Period 5 if your structure has changed as such that there is no longer a Period 5.

For more information see [How to Create a New Period Structure](#).

Creating a New Academic Year

To ensure that the system continues to run smoothly as you enter the new **Academic Year**, it is important that you define the new **Academic Year**.

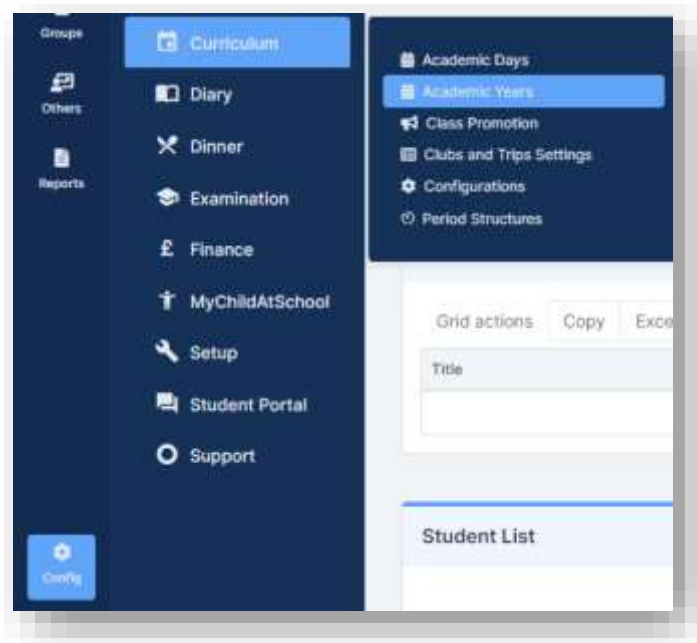
The system will automatically check for the **End date** of the current year and will automatically set the start date of the forthcoming year to **the day immediately following this date**. This is correct and don't worry if your first academic day is sometime after this as you will be able to set that later.

The **End Date** of the current academic year may need changing. All Bromcom calendar weeks need to begin on a Sunday and end on a Saturday. This year the last Saturday in August is the 30th.

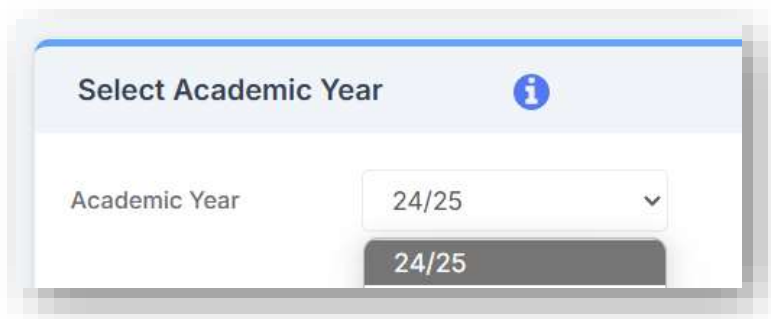
To change the forthcoming year's, **Start Date** you need to edit the current Academic Year **End Date**

Note – When amending the end date of the current Academic Year, it can take a while to save.

Go to **Config>Curriculum>Academic Years**.



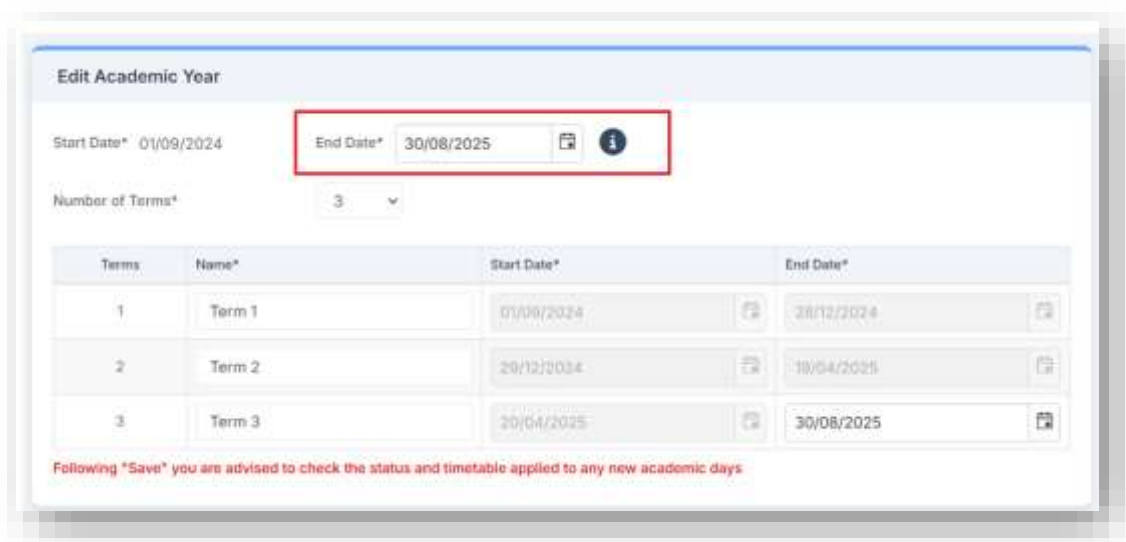
Ensure the current Academic Year is selected from the **Academic Year** drop down.



The screenshot shows a dialog box titled "Select Academic Year" with an information icon in the top right. Below the title, there is a label "Academic Year" followed by a dropdown menu. The dropdown menu is open, showing the selected option "24/25" and another "24/25" option below it.

In the Edit Academic Year screen, the **End Date** must be a **Saturday**.

For example, if the new academic year starts on **Sunday 31st August 2025**, then the **End Date** of the previous year must be **Saturday 30th August 2025**.



The screenshot shows the "Edit Academic Year" screen. At the top, there is a "Start Date*" field with the value "01/09/2024" and an "End Date*" field with the value "30/08/2025". The "End Date*" field is highlighted with a red box. Below the "End Date*" field is a "Number of Terms*" dropdown menu with the value "3". Below the dropdown menu is a table with the following columns: "Terms", "Name*", "Start Date*", and "End Date*". The table contains three rows of data:

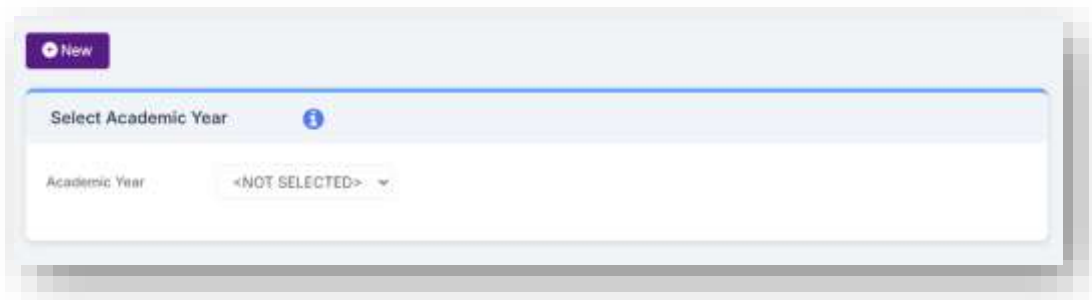
Terms	Name*	Start Date*	End Date*
1	Term 1	01/09/2024	28/12/2024
2	Term 2	29/12/2024	18/04/2025
3	Term 3	20/04/2025	30/08/2025

Below the table, there is a red text message: "Following 'Save' you are advised to check the status and timetable applied to any new academic days".

If you need to make an amendment, choose the relevant date from the calendar picker then click **Save**, top left.

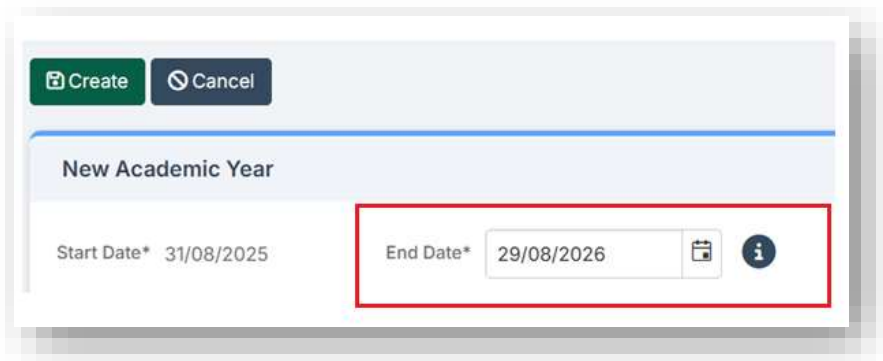
To set up the **New Academic Year**, go to **Config>Curriculum>Academic Years**.

Click on the top left **New** button.

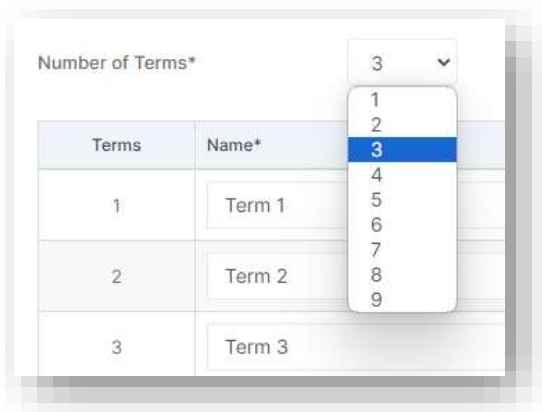


You are now creating your **New 2025/25 Academic Calendar**. Check the **New Academic Years End Date** and change if necessary, this **MUST BE** a Saturday.

For most Customers this would be **Saturday 29th August 2026**. Please see below for an example of how the **2025/26 Academic Year Start Date*** and **End Date*** could look.



Select the required **Number of Terms*** from the dropdown list.



We **highly** recommend that you include the different holidays in your terms and use the **Academic Days** page to mark those holidays as the relevant day status.

For each term fill in the **Term Name***, **Start Date*** and **End Date***. These **must follow** the logic of:
Sunday = Start Date and **Saturday = End Date**

Please see below for an **example** of how the **New 2025/26 Academic year** could look. Note there are **no gaps in the End Date* and Start Date* of each Term.**

The screenshot shows a form titled "New Academic Year". At the top, there are fields for "Start Date*" (31/08/2025) and "End Date*" (29/08/2026). Below this is a "Number of Terms*" dropdown set to 3. A table lists three terms: 1 (Autumn), 2 (Spring), and 3 (Summer). Each term has a "Start Date*" and "End Date*" field. The dates for Term 1 are 31/08/2025 and 03/01/2026; for Term 2, 04/01/2026 and 28/03/2026; and for Term 3, 29/03/2026 and 29/08/2026. Below the table are fields for "Period Structure" (2 Week Timetat), "Colour Code" (black), "Timetable Day for first week day of Term 1" (1), and "TT Week" (Week 1).

Terms	Name*	Start Date*	End Date*
1	Autumn	31/08/2025	03/01/2026
2	Spring	04/01/2026	28/03/2026
3	Summer	29/03/2026	29/08/2026

Do not worry if your first **Academic Day** (the date the students start) or end of terms do not adhere to these dates completely, you will get the chance to **Edit Academic Days** in the next stages.

Now select the **Period Structure** that you are using from the dropdown list. If you have defined a new **Period Structure** in **Step 1** of the **End of Year process**, then select this here, otherwise you can choose the structure from the current year. In this example we have chosen the 'Current' **Period Structure**.

The screenshot shows a close-up of the "Period Structure" dropdown menu, which is set to "Current". Other fields visible include "Colour Code" (black), "Timetable Day for first week day of Term 1" (1), and "TT Week" (N/A).

You can (if you wish) change the colour associated with the **Academic Year**, which will change the text colour on the **Academic Days** screen, by selecting the **Colour Code** button.

Finally, when picking the **Timetable day for first weekday of Term 1** always select **1** as this value determines what day in the week the **Day 1** will be, for example if **2** is selected here Tuesday will be **Day 1**, rather than Monday.

Review your settings and then click on the **Create** button.

The process may take a few minutes to create all the calendar entries.

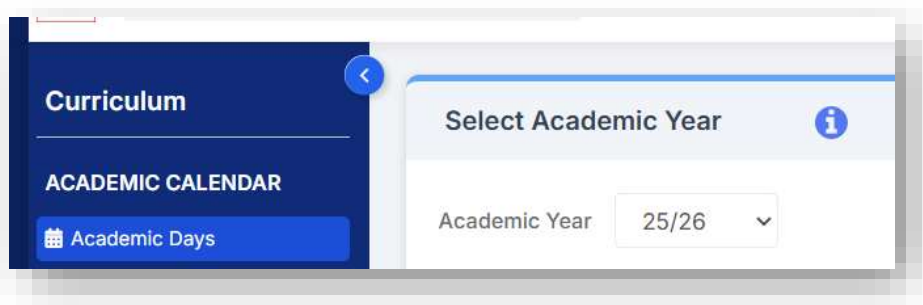
You have now created the New Academic Year.

Edit Academic Days

Go to **Config>Curriculum>Academic Days** to now begin editing the days within your new academic year to include holidays, inset days and staff only days.



From the **Academic Year** drop down choose **25/26**




In **Key and Display Options** the **Period Structure** you have chosen for **2025/26** will be displayed as per the example image below, highlighted within the red box

Key and Display Options

Day Status: (-) Normal School Day; (\$) Staff Only; (!) Enforced Closure; (#) Holiday; (*) Not part of Term

Calendar defined using the following period structure(s):

 One week 5 Periods (2) - Start Date: 31/08/2025 - End Date: 29/08/2026

Display Timetable Days Display Week Labels


Autumn 25/26 31/08/2025 to 03/01/2026 




Spring 25/26 04/01/2026 to 28/03/2026 

Summer 25/26 29/03/2026 to 29/08/2026 

Click on the right-hand drop-down **Arrow** in each **Term** to expand the individual weeks in that **Term**.

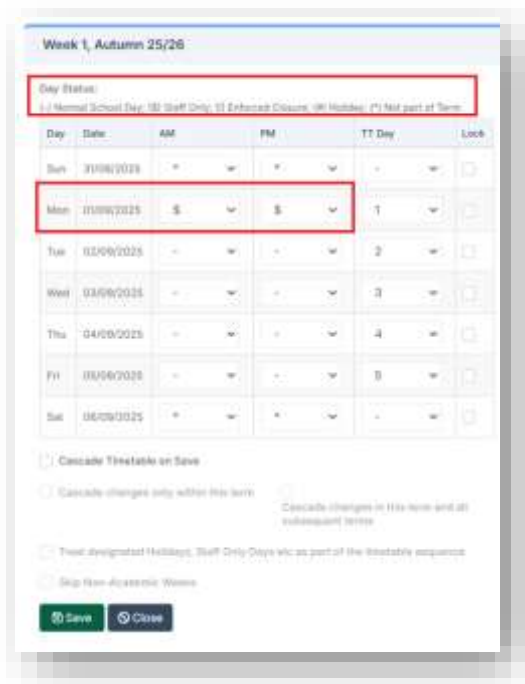
Then click the **Edit** button on the **right of the screen** to edit the individual days.

Autumn 25/26 31/08/2025 to 03/01/2026 

Week	From Date	To Date	Time Table Week	Sun AM	Sun PM	Mon AM	Mon PM	Tue AM	Tue PM	Wed AM	Wed PM	Thu AM	Thu PM	Fri AM	Fri PM	Sat AM	Sat PM	Edit
1	31/08/2025	06/09/2025	1	*	*	-	-	-	-	-	-	-	-	-	-	*	*	
2	07/09/2025	13/09/2025	1	*	*	-	-	-	-	-	-	-	-	-	-	*	*	
3	14/09/2025	20/09/2025	1	*	*	-	-	-	-	-	-	-	-	-	-	*	*	

Then set each individual day's **Day Status** using the drop down choices for **AM and PM**, this includes staff only days, school holidays and public holidays.

In the **example below** Monday 1st September 2025 has been set as **\$ Staff Only**



In some Local Authorities the attendance teams are no longer accepting \$ (our 'Staff Only' symbol) in Student Attendance Certificates. If you are unsure which code to use, consult with your Local Authority.

Normally, the standard timetable day cycle will be a logical numeric progression (1, 2, 3, 4, etc...) but there may be deviations from this that need to be accounted for. If they exist, then simply select the week containing the adjustment and change the value in the dropdown against that day (you can view **Timetable Days** by clicking the **Display Timetable Days** option).

Generally, Days 1-5 are Week 1, Days 6-10 are Week 2.

If you have a multi-week timetable, it is **critical** to ensure that the **Timetable Week** numberings are correct. This is to ensure your timetable is consistent for the rest of the coming year. Check the timetable days are correct by clicking the appropriate week number after each half term/new term. Please see an example screenshot showing the multi-week timetable.

Week	From Date	To Date	Time Table Week	Sun AM	Sun PM	Mon AM	Mon PM	Tue AM	Tue PM	Wed AM	Wed PM	Thu AM	Thu PM	Fri AM	Fri PM	Sat AM	Sat PM	Edit
1	28/08/2022	03/09/2022	1	*	*	-	-	-	-	-	-	-	-	-	-	*	*	
2	04/09/2022	10/09/2022	2	*	*	-	-	-	-	-	-	-	-	-	-	*	*	
3	11/09/2022	17/09/2022	1	*	*	-	-	-	-	-	-	-	-	-	-	*	*	
4	18/09/2022	24/09/2022	2	*	*	-	-	-	-	-	-	-	-	-	-	*	*	

Autumn 23/24 27/08/2023 to 30/12/2023

Week	From Date	To Date	Term Table Week	Sat AM	Sat PM	Sun AM	Sun PM	Mon AM	Mon PM	Tue AM	Tue PM	Wed AM	Wed PM	Thu AM	Thu PM	Fri AM	Fri PM	Sat AM	Sat PM			
1	27/08/2023	02/09/2023	1	*	*	-	-	Day 1	-	-	Day 2	-	-	Day 3	-	-	Day 4	-	-	Day 5	*	*
2	03/09/2023	09/09/2023	1	*	*	-	-	Day 1	-	-	Day 2	-	-	Day 3	-	-	Day 4	-	-	Day 5	*	*
3	10/09/2023	16/09/2023	1	*	*	-	-	Day 1	-	-	Day 2	-	-	Day 3	-	-	Day 4	-	-	Day 5	*	*
4	17/09/2023	23/09/2023	1	*	*	-	-	Day 1	-	-	Day 2	-	-	Day 3	-	-	Day 4	-	-	Day 5	*	*
5	24/09/2023	30/09/2023	1	*	*	-	-	Day 1	-	-	Day 2	-	-	Day 3	-	-	Day 4	-	-	Day 5	*	*
6	01/10/2023	07/10/2023	1	*	*	-	-	Day 1	-	-	Day 2	-	-	Day 3	-	-	Day 4	-	-	Day 5	*	*
7	08/10/2023	14/10/2023	1	*	*	-	-	Day 1	-	-	Day 2	-	-	Day 3	-	-	Day 4	-	-	Day 5	*	*
8	15/10/2023	21/10/2023	1	*	*	-	-	Day 1	-	-	Day 2	-	-	Day 3	-	-	Day 4	-	-	Day 5	*	*
9	22/10/2023	28/10/2023	1	*	*	-	-	Day 1	-	-	Day 2	-	-	Day 3	-	-	Day 4	-	-	Day 5	*	*
10	29/10/2023	04/11/2023	1	*	*	-	-	Day 1	-	-	Day 2	-	-	Day 3	-	-	Day 4	-	-	Day 5	*	*
11	05/11/2023	11/11/2023	1	*	*	-	-	Day 1	-	-	Day 2	-	-	Day 3	-	-	Day 4	-	-	Day 5	*	*
12	12/11/2023	18/11/2023	1	*	*	-	-	Day 1	-	-	Day 2	-	-	Day 3	-	-	Day 4	-	-	Day 5	*	*

Cascade Timetable on Save: Use the **Cascade Timetable on Save** option when working with a two-week timetable and you need to insert a holiday. Set all days and sessions in the relevant holiday week(s) to the appropriate Holiday status code, then **Save** those weeks. Next, edit the week when students return to school. Assign the correct timetable days to each day (e.g. Days 1-5 for Week 1 or Days 6-10 for Week 2.) Before saving, **enable the Cascade option**. This ensures the correct timetable sequence continues from the return date onward for the rest of the year.

Note: If you skip the cascade step, the system will include the holiday weeks in the timetable sequence. This could result in students returning on the wrong timetable week.

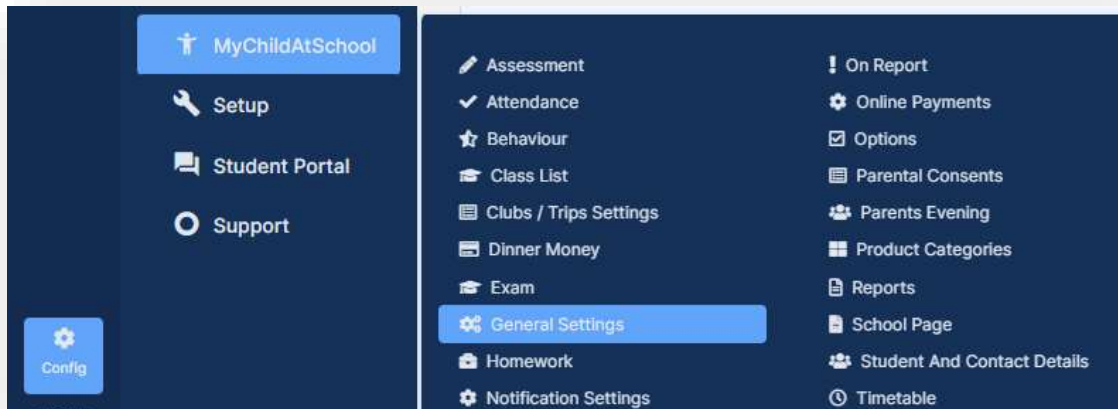
Tip: If you are amending your **Academic Days** or have used **Cascade Timetable on Save**, tick **Display Timetable Days and Display Week Labels** to view/ensure that your **Academic Days** are correct (Days 1-5 are in Week 1 and Days 6-10 are in Week 2).

When you are happy click **Save**.

Once you have set the specific day details for each term then you have completed the **Academic Year** setup

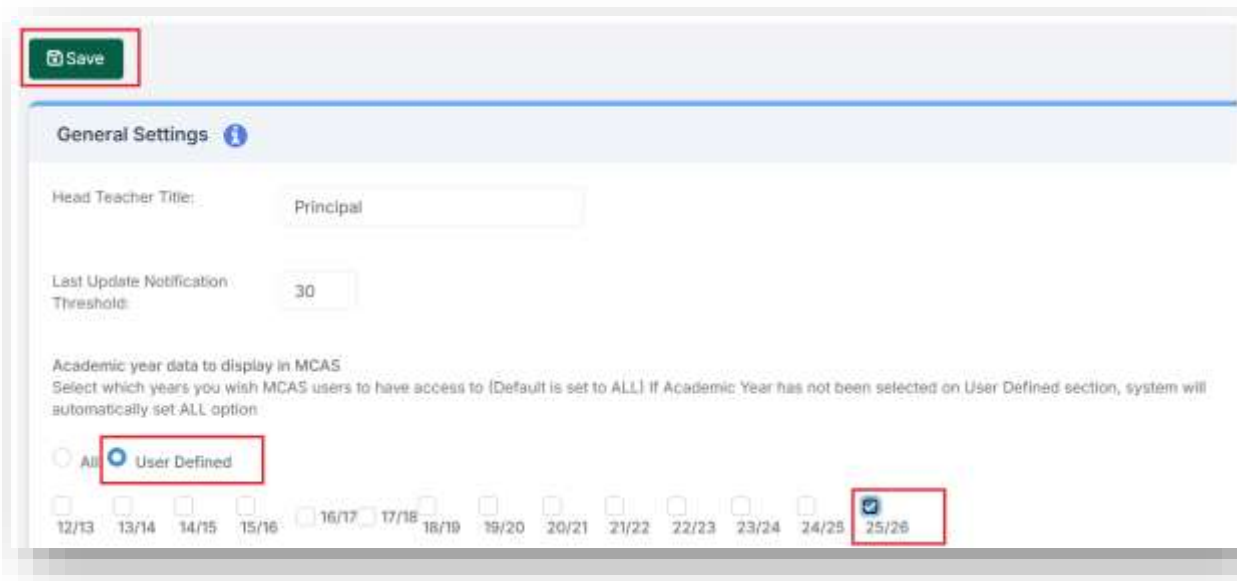
MCAS General Settings

If you use **MyChildAtSchool**, go to **Config>MyChildAtSchool>General Settings**.



Once on this page, you need to ensure the new **Academic Year** will be visible to parents.

If you have **All** selected in **Academic Year to display in MCAS**, then you do not need to do anything here.



If you have the **User Defined** option selected, then ensure the new **2025/26 Academic Year** and any previous **Academic Years** that are to be displayed are ticked.

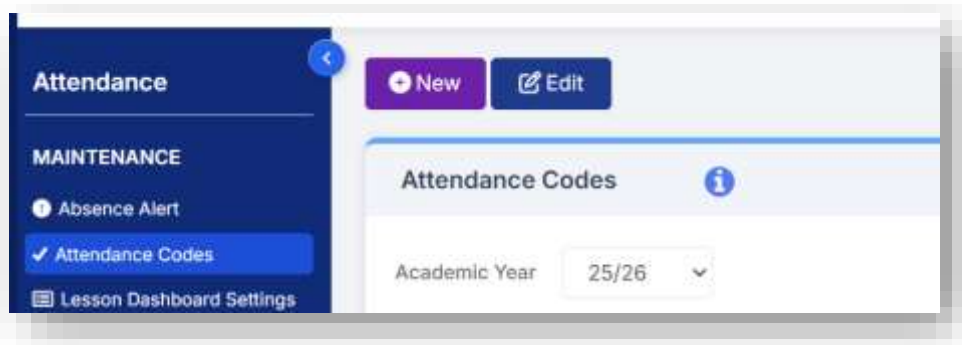
Click on **Save**

Altering Attendance Codes

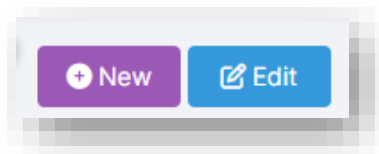


Do not change your Attendance Codes if you are adhering to your Education Authorities approved list of set Attendance Codes

To make any amendments or to create new **Attendance Codes**, go to **Config>Attendance>Attendance Codes** and set the **Academic Year** dropdown to **25/26**



Select the **New** button if you want to create a fresh **Attendance Code**.



Otherwise click the **Edit** icon to make changes to an existing **Code**.

For more information see [How to Create and Manage Attendance Codes](#)

Setting Registration Update Parameters



This step is required for all schools where students do not attend AM and/or PM registration and therefore need marks from teaching periods to write back into the AM/PM Sessions.

If this step is not completed, none of the expected automatic updates of AM/PM attendance from other periods will occur. **Therefore, it is imperative that it is finished in its entirety.**

Go to **Config>Attendance>Register Update Parameters**.

Change the **Single Date** radio button to the **Multiple Dates** radio button.

Set your **Academic Start*** to the first Academic day for the new Academic Year and **Academic End*** to the last academic day of the year.

Please enter parameters ⓘ

Single Date Multiple Dates

Academic Start* 02/09/2025 Academic End* 24/07/2026

Week 1 Monday Tuesday Wednesday Thursday Friday

In the example below a **2-week timetable** is shown by the **Week 1** and **Week 2**.

Save Last Available Settings

Please enter parameters

Single Date Multiple Dates

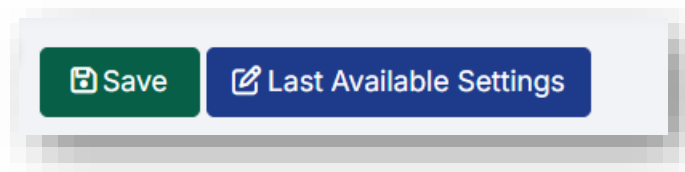
Academic Start* 29/08/2022 Academic End* 31/07/2023

Week 1 Monday Tuesday Wednesday Thursday Friday

Week 2 Monday Tuesday Wednesday Thursday Friday

Select the relevant options for your **Register Update Parameters**. Below is an example of how this might look.

If your forthcoming year's structure has not changed, simply click on the **Last Available Settings** button at the top left of the screen and then click on **Save**.



If you are changing the **Period Structure** for the new **Academic Year**, then this screen will require careful configuration. To this end it is recommended that you contact the **Helpdesk** to assist you in configuring these additional options if you are unsure. See [How to use Register Update Parameters](#).

If you receive the following warning whilst setting up this page; '**Warning: inconsistent data found in database**', it should disappear once you have completed all appropriate parameters, however please contact the Helpdesk if this is not the case.

Once you are happy with any changes you have made, click on the **Save** button.

Maintenance of Curriculum Entities

This is where you would change your **Curriculum** information such as **Year Groups, Subjects, Departments, Faculties, Houses, Learning Aims** etc. if required.

If you are not making changes to these settings then you can skip to the next section, otherwise please read on.

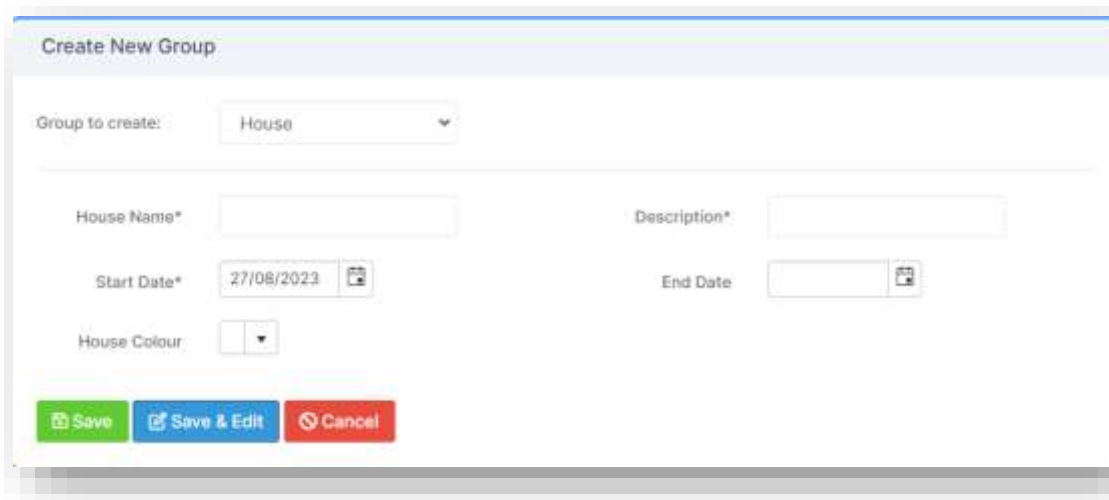
Houses – if you are introducing a **House** system or changing the way it is organised, go to **Groups>Group Type>House**.

To create a new **House** with a start date of the beginning of the new **Academic Year** click on the **New** button.



The screenshot shows a web interface with a top navigation bar containing 'View', 'New', 'Selections', and 'Actions' buttons. Below the navigation bar, there is a status bar indicating '0 of 6 selected' and a 'Group Type' dropdown menu set to 'House'. The main content is a table with the following data:

Group Name	Group Description	Group Type	Main Teacher
Alverton	Alverton	House	Mrs Christine Andrews
Brunel	Brunel	House	Mr Steve Smith
Endeavour	Endeavour	House	Mr Charles Sicketon
Galileo	Galileo	House	Mr Pierre Montmarble
Jupiter	Jupiter	House	Mrs Christine Andrews
Studio	Studio	House	Mr Jason Pattinson



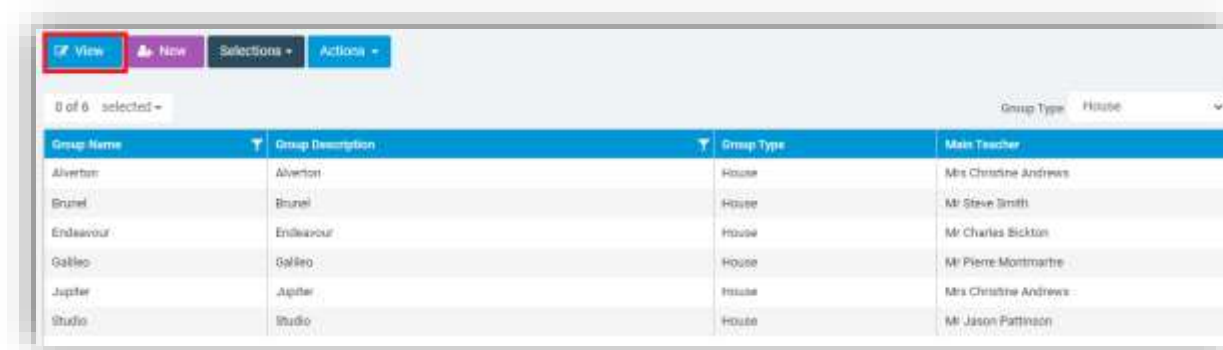
The screenshot shows a 'Create New Group' form. The 'Group to create:' dropdown is set to 'House'. The form contains the following fields:

- House Name* (text input)
- Description* (text input)
- Start Date* (date picker, showing 27/08/2023)
- End Date (date picker)
- House Colour (dropdown menu)

At the bottom of the form, there are three buttons: 'Save', 'Save & Edit', and 'Cancel'.

Enter the new **House** details and click on the **Save** button.

To edit the existing **Houses**, select the **Houses** and click on the **View** button.



The screenshot shows the same 'Groups' page as above, but with the 'View' button in the top navigation bar highlighted with a red box. The table of houses remains the same.

Save Cancel Endeavour Previous Next Membership Display: Current Membership

Basic Group Details

Name* Endeavour Description* Endeavour

Start Date* 30/08/2023 End Date*

Additional Group Details

Colour

Associated Staff

Staff Name	Role	Start Date	End Date	Actions
W C Chazmay ICCI	Head of House	23/11/2023	Track group end date	

Student Memberships - 0 (Female 0 / Male 0)

If you make any amendments, remember to click **Save** in the top left.

Subjects, Departments and Faculties will normally continue through from year to year.

If any are not in use for the next year, they can be edited by pressing **View** and entering an **End Date** within the **Basic Details** Panel (see example screenshot below). Memberships of **Staff**, as well as the addition of **Subjects to Departments**, and **Departments to Faculties** can also be amended to reflect the situation for next year. Otherwise, they continue through unchanged provided there are no end dates applied e.g., if a member of staff leaves and this sets an end date to all their memberships. Once you're happy **Click Save**.

Save Cancel Hair & Beauty Previous Next Membership Display: Current Membership

Basic Group Details

Name* Hair & Beauty Description* Hair & Beauty

Start Date* 31/07/2022 End Date* 30/08/2025

If a group will no longer be continuing into the new academic year, we advise that you DO NOT DELETE the group, always ADD AN END DATE to make it inactive going forward. This will ensure that you can report back historically if you need to

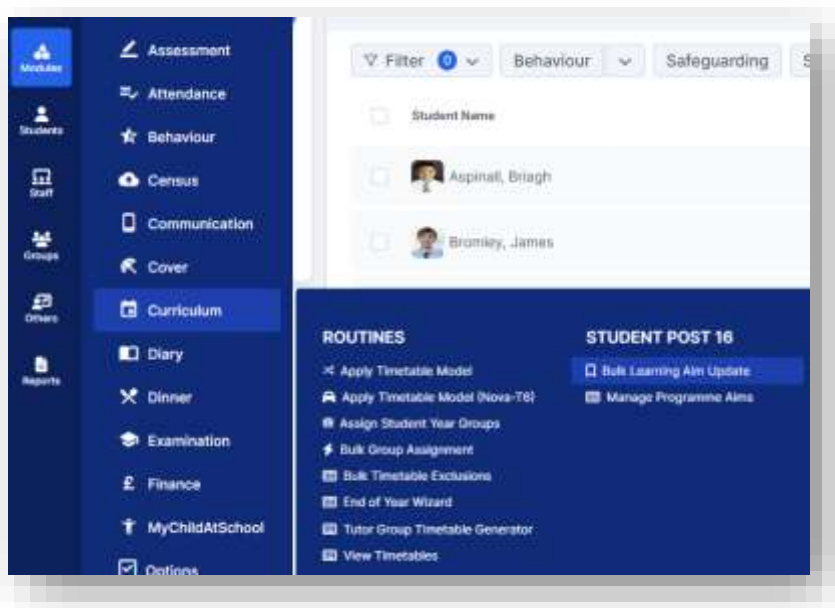
IMPORTANT: In all instances, please remember to **double check any entered Start or End dates** to ensure that they correctly match the appropriate dates from either the **Current Year** (in the case of items being ended) or the forthcoming **Academic Year** (in the case of new items being added).

Student Learning AIMS – Post 16

For **Student Learning Aims** that are continuing from the **Current Academic Year** to the new **Academic Year** please check the planned end dates go through into the new **Academic Year**.

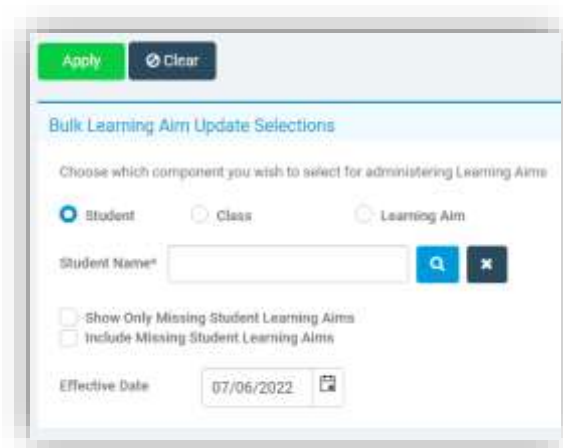
If a **Course** is ending, then the related **Student Learning Aims** also need to be ended.

This can be done through **Modules>Curriculum>Bulk Learning Aim Update**.



You can select to update the **Learning Aims** by **Student**, **Class**, or **Learning Aim**.

Once you have made your selection, simply click on the **Apply** button and this will take you to the next stage of the process.



On the next page you will see the selected **Students** with All of their related **Learning Aims**.



Please check/amend the relevant end dates/statuses and then click on the **Save** button.

You will need to repeat this process for any **Learning Aims** that need to have a different **Status** or different **End Date** applied. If you have any problems with this process, please contact the Helpdesk.

If you use **Behaviour**, please continue to the next section. Otherwise, please proceed to [Promoting Year Groups](#).

Behaviour

Complete this section if your **Behaviour Setup** needs updating for the upcoming **Academic year**, or if you are using **Pathways** and need to reset/start a new points total for **Student Actions**.

Reconfiguration of Behaviour is only required if you use the Behaviour module, and you **ARE** changing your Behaviour setup in the forthcoming year (this includes removing or adding new Events or Actions)

Any **Behaviour Events/Actions** that will not be used in the forthcoming **Academic Year** should be expired.

For **Behaviour Actions** go to **Config>Behaviour>Actions** and for **Events** go to **Config>Behaviour>Events**.

To expire an **Action or Event**, you have two options:

Expire Immediately: Select the Action(s) or Event(s) and click the **Expire** button at the top of the page to end date it straight away.

Set a Future End Date: Select the Action(s) or Event(s), click **Edit**, and manually enter the desired end date.

Name	Description	Start Date	End Date	Adjustments	Year Required	Duration Required	Protected	Event Type	Duration Type	Event Category
AA	100% Attendance (months)	19/09/2020		5	No	No	Yes			Tuition Category
AA	No Late (months)	19/09/2020		5	No	No	Yes			Tuition Category
CG	Chewing Gum	19/09/2021	14/06/2024	1	No	No	Yes	Negative		Tuition Category
CH	Good Classroom	19/09/2021		1	No	No	Yes	Positive		Tuition Category
DB	Dangerous Behaviour	19/09/2021		-6	No	Yes	Yes	Negative		Tuition Category
DS	Disruptive	19/09/2021		-15	Yes	Yes	Yes	Negative		Tuition Category
ETH	Good Aids with	19/09/2021		1	No	No	Yes	Positive		Tuition Category
FD	Fighting	19/09/2021		-12	No	Yes	Yes	Negative		Tuition Category
HCB	Homework Club	27/01/2022		-1	Yes	No	Yes			Tuition Category
HEX	Homework	19/09/2021		0	Yes	No	Yes	Neutral		Tuition Category
IR	Improved Behaviour	19/09/2021		2	No	No	Yes	Positive		Tuition Category
LAF	Late with no code	19/09/2020		-1	No	No	Yes			Tuition Category
LAF	Late with no code	19/09/2020		-1	No	No	Yes			Tuition Category

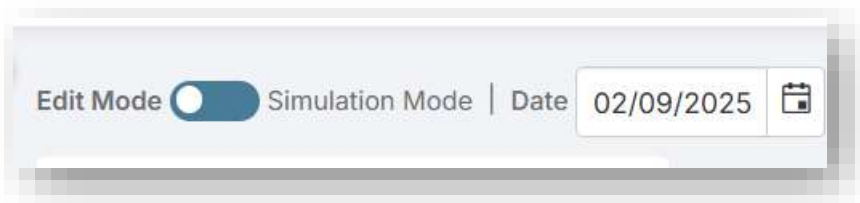
Expiring an **Event or Action** only removes it from the system from **that date onwards**. Historically it will still be available and prior instances where they were used will still be retained.

Pathways

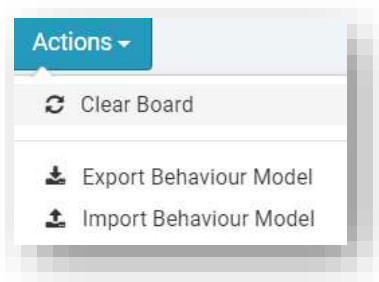
Any new **Events or Actions** need to be created in the MIS via the **Behaviour** module before you can use them in **Behaviour Pathways**.

If you are setting up a **New Behaviour Model in Pathways** that is different to your current **Model** go to **Config>Behaviour>Pathways**.

IMPORTANT: Select the required future **Date** for the new model on the **top of the screen**, example below.



If you are creating a **new Model**, use the **Actions** drop down and choose **Clear Board**.



You will need to do this for each **Category** that requires replacing.

After this, simply setup the new **Behaviour Pathways** following the normal instructions. Once you're happy ensure that you click **Save**.

Starting a New Points Total

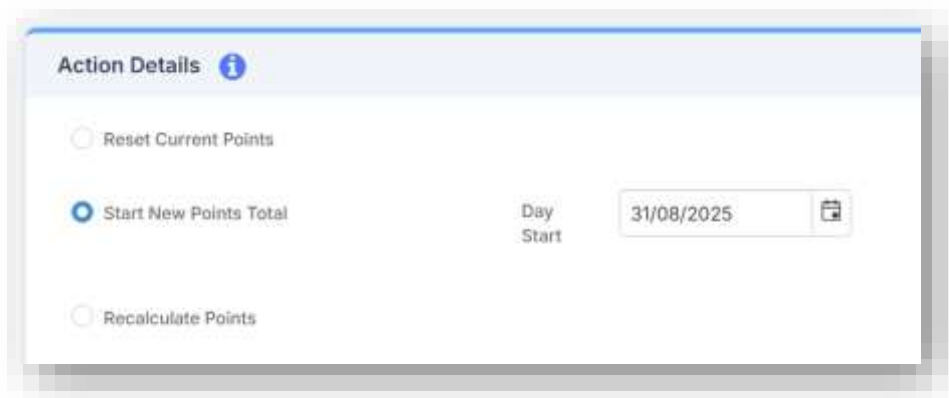


Starting new points totals is **extremely important**; If not completed, then all of next year's points will simply be added to the current year's points totals

Go to **Modules>Behaviour>Reset Student Actions**.

Select the **Start New Points Total** option.

Enter the **Day Start** date to start the new totals from (most likely the first Sunday of the new **Academic Year**).



The screenshot shows a dialog box titled "Action Details" with an information icon. It contains three radio button options: "Reset Current Points", "Start New Points Total", and "Recalculate Points". The "Start New Points Total" option is selected. To the right of this option is a "Day Start" label and a date input field containing "31/08/2025" with a calendar icon.

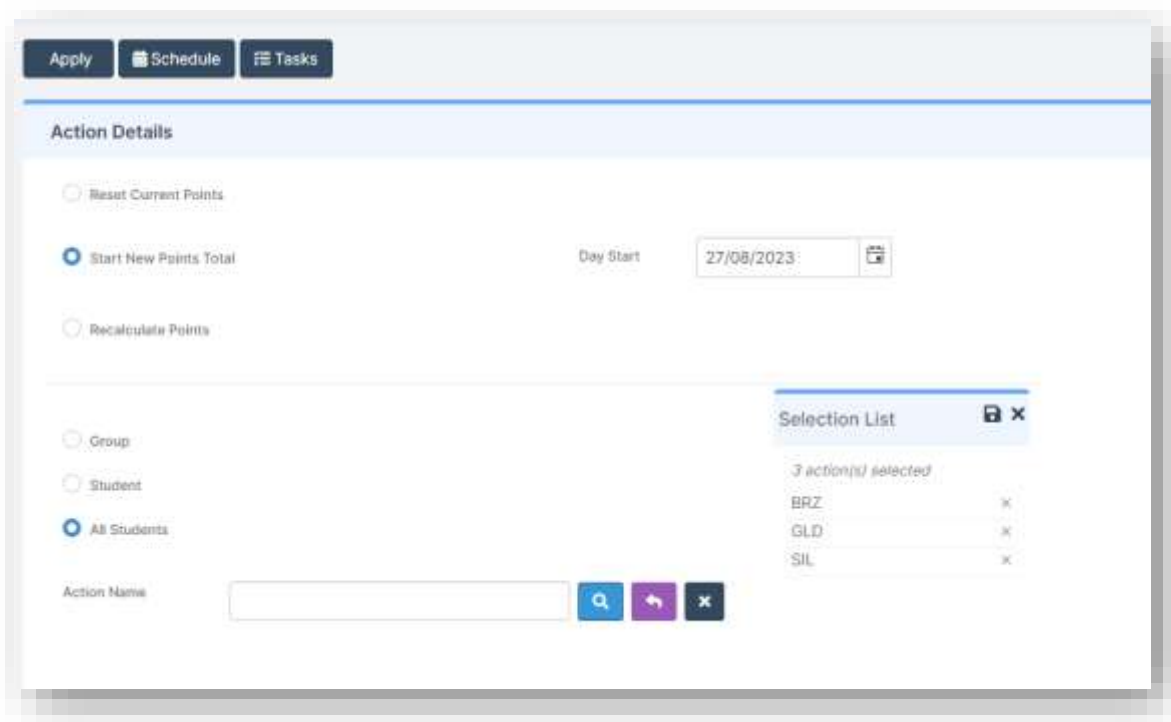
- Group
- Student
- All Students

If you want to start a new **Points Total** for all **Students** and all actions, select the '**All Students**' option, then click on the blue spy glass next to the **Action Name** field and select all actions. Now click **Apply** in the top left corner of the page.

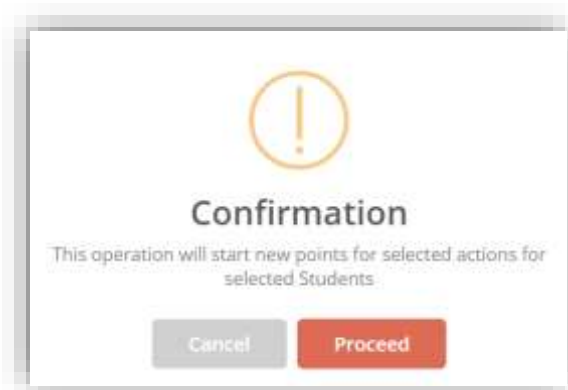
If you **are not** starting a new **Points Total** for **all Students** and **all Actions**, then do the following:

Select the **Students** you want to start new point totals for by selecting either **Student** or **Group** and select the **Students** or **Groups** you wish to **Start New Points Total** for.

Select the **Actions** you are starting new **Points Totals** for from **Action Name** and check the **Selection List** is correct.



Click **Apply**. You will get a warning message prompt. Click the **Proceed** button to continue.



Detention Types

IMPORTANT: We recommend that you also review/update your **Detention Schedules** for each of your **Detention Types**, especially if you have changed your **Period Structure** for the new Academic Year.

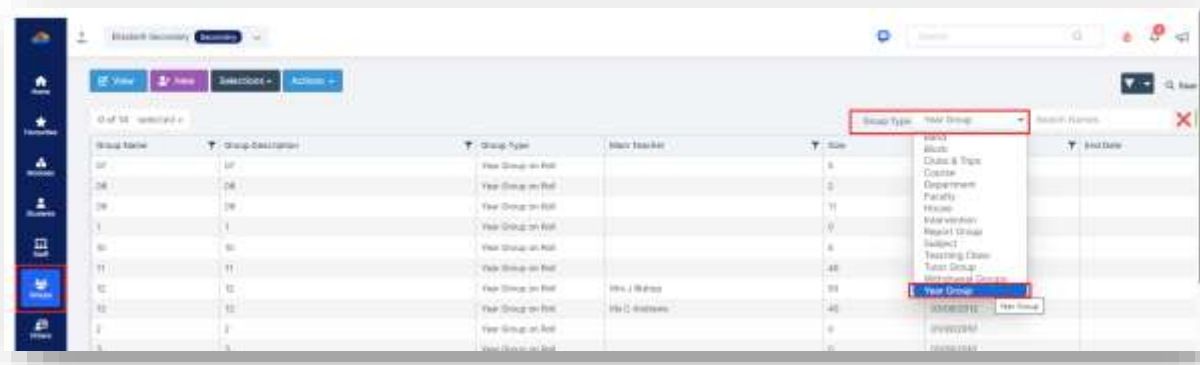
For more information see [How to Create a Detention Schedule](#)

Note: In order to make any changes to **Detention Types** in the **New Academic Year**, wait until the day after the last day in the final term of the current academic year, then use a [Data Boundary](#) for the **Next Academic Year** to update the **Detention Type**.

Promoting Year Groups

Before we do any form of **Promotion** for the **Year Groups**, we need to ensure that each **Year Group** has a **Next Year Group** linked to it.

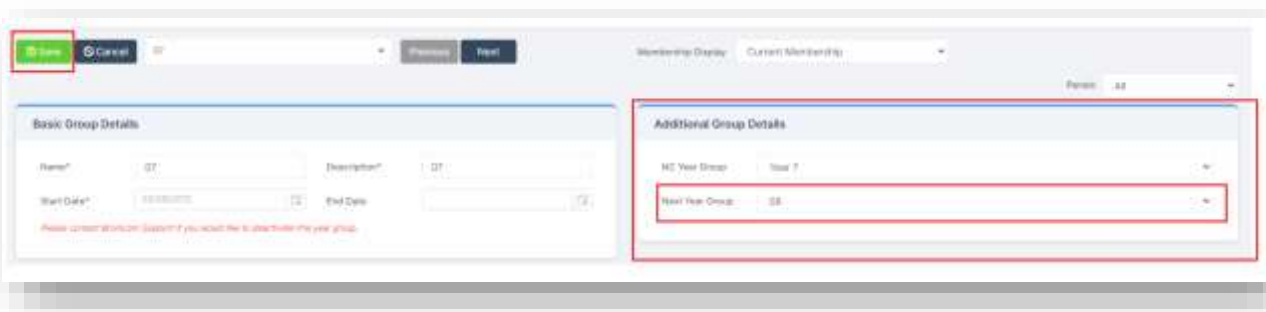
This can be done by going to **Groups>Group Type=Year Group>select your Year Groups** (you can select more than one)



Then **click View**.



Look in the **Additional Group Details** section and make sure that the **Next Year Group** drop down has the correct **Year Group** selected. Once you have entered the next **Year Group** you will be able to press **Save** and then click on the **Next** button to take you to the next **Year Group** if you have selected more than one **Year Group**



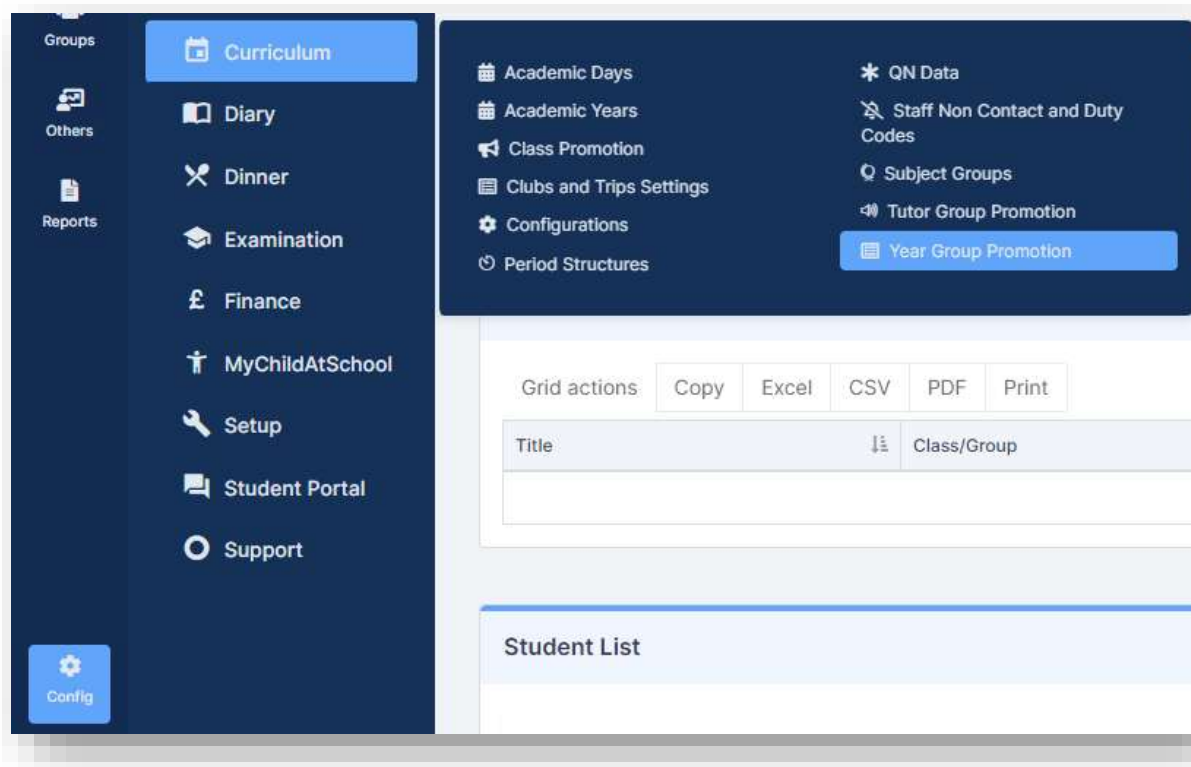
If your **Year Groups** already have the next **Year Group** entered, please skip this stage.

Year Groups continue so don't worry about the start and end dates. Note: It is not possible to amend the start and end dates for Year Groups

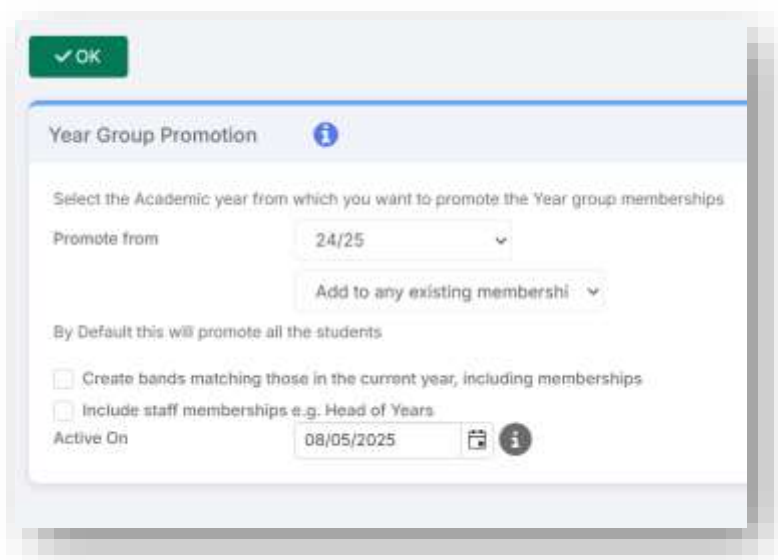
Please see the table below for guidance on how to set your **Current** and **Next Year Groups**. If you have **Year Groups** outside of this list and are not sure what the **Next Year Group** should be, please contact whoever you contact for support.

Current NC year	Current NC Year Name	Next Year Group
7	Year 7	8
8	Year 8	9
9	Year 9	10
10	Year 10	11
11	Year 11	12
12	Year 12	13
13	Year 13	13 (13 must have a Next Year Group in secondary schools)
?	<NOT SELECTED>	?

When you are ready to **Promote** your **Year Groups**, go to **Config>Curriculum>Year Group Promotion**.



The **Year Group Promotion** page will then be displayed.



Promote from will be set to the **current year by default**, or last year if you are doing this in September. There are **two options** on the following dropdown menu:

- **Add to any existing Memberships** preserves any memberships that may have been added to the **Year Group** for next year by other means, for example a new student that has been added to the system manually with a future start date in September.
- **Overwrite all existing memberships** will delete any existing memberships in the year group for next year and replace with those being promoted.

There are two additional checkboxes tick these to:

- **Create Bands** matching those in the **Current Year**, including **Memberships**.
- **Include staff memberships e.g., Head of Years**, where **Head of Years** are moving up with the **Year Group**. If you do not include **Staff**, if their **Membership** in the group is set to **Track Group End Date**, then their **Membership** in

Finally, the **Active On** selector allows you to pick the date that **Year Group** memberships will be taken and promoted from.

It is CRUCIAL that this is set to a Date in the CURRENT Academic Year before September, when the Students are still in their **CURRENT Year Groups**.

This allows the **Students** to be Promoted into the correct/next **Year Groups** in the new **Academic Year**. **Promoting from a Date in the new Academic Year will not work**, the **Active On Date** must in the **24/25 Academic Year**.

the group will continue in the same **Year Group** (i.e. they will not move up with the students). Otherwise, their association with the **Year Group** ends at the end at their assigned **End Date**.

Clicking on the top left **OK** button will **Promote ALL** of your **Year Groups**.

Important: For a further in depth look at **Year Group Promotion** please refer to the following guide [How to Approach Year Group and Tutor Group Promotion](#)

Promoting Tutor Groups

Google/O365 Integration

If you are using Google/O365 Integration, then you **must End Date** all **Tutor Groups**.

Mixed/Vertical Tutor Group

You do not need to promote **Mixed/Vertical Tutor Groups**, the **Groups** can remain unchanged without an **End Date**.

Student Memberships can be amended via the **Student Memberships** panel of the **Tutor Group** itself. The memberships can be transferred to a new **Tutor Group** with the relevant future start date via the **Actions** column to the right-hand side.

Mixed/Vertical Tutor Groups

You do not need to promote **Mixed/Vertical Tutor Groups**, the Groups can remain unchanged without an End Date.

Student Memberships can be amended via the **Student Memberships** panel of the **Tutor Group** itself. The memberships can be transferred to a new **Tutor Group** with the relevant future start date via the **Actions** column to the right-hand side.

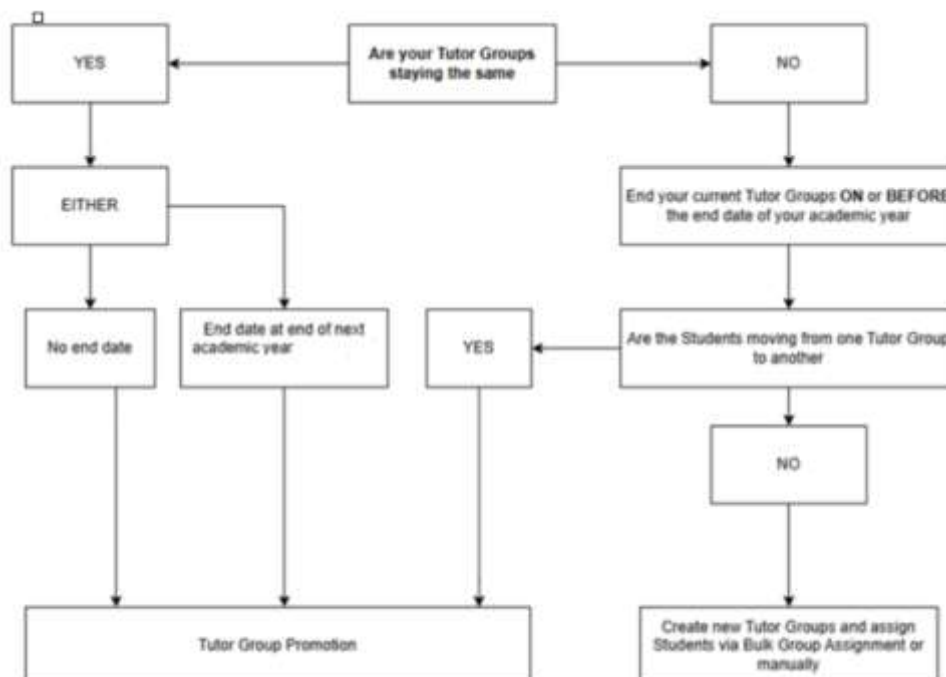
Non-Mixed Tutor Groups

Tutor Group Names remaining the same - your tutor groups can be left without an end date so the groups remain active year on year allowing student memberships to be promoted.

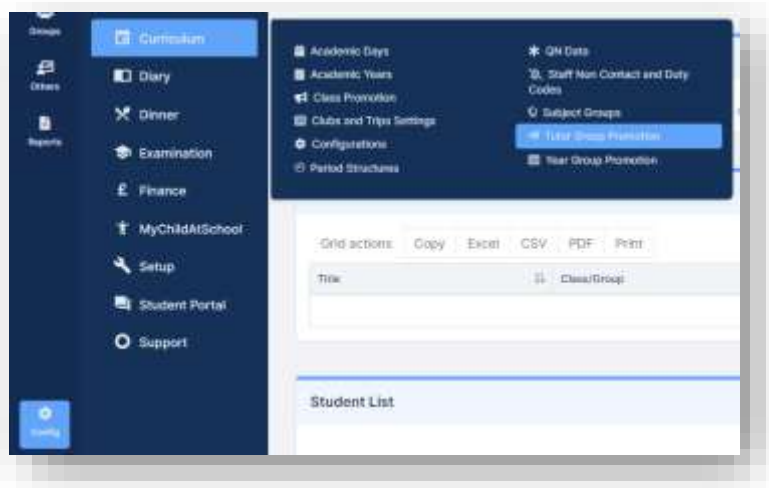
Tutor Group Names changing - your tutor groups must be end dated and new tutor groups created for the new academic year. Student memberships can then be promoted.

IF your current 24/25 Tutor Groups are ending, and **you are not going to continue using the SAME groups next year then please ensure** that they have an **End Date** that is **BEFORE** the **Start Date** of the **New Academic Year** and that these Dates do not overlap

See the flowchart below for more information on **Promoting Tutor Groups**.



To Promote Tutor Groups, go to **Config>Curriculum>Tutor Group Promotion**



Click the **blue spy glass**, this will open the **Group Selector** list where you can select the **Tutor Groups** you wish to **Promote**.



Click on the **Tutor Groups** you wish to **Promote** in the **Group Selector** list and click **Done**.

Then click **Go**.

Group Selector

Group Name:

Group Type: Tutor Group

Main Teacher:

Subject:

Year Group: <NOT SELECTED>

Filter: <NOT SELECTED>

Active Date Filter: 22/09/2024 22/09/2024

Address: <NOT SELECTED>

17 results found | 8 items selected

Group Name	Group Type	Main Teacher	Select	Year Group	Group Size
07A	Tutor Group	Mr J Bradley	<input checked="" type="checkbox"/>	07	7
10A	Tutor Group	Mrs K. de Mello	<input checked="" type="checkbox"/>	10	9
11A	Tutor Group	Mr J Parkinson	<input checked="" type="checkbox"/>	11	20
11B	Tutor Group	Mr C Baker	<input checked="" type="checkbox"/>	11	18
12A	Tutor Group	Mr J Bowles	<input checked="" type="checkbox"/>	12	23
12B	Tutor Group	Mrs J Bishop	<input checked="" type="checkbox"/>	12	25
13A	Tutor Group	Mr S Duffly	<input checked="" type="checkbox"/>	13	21
13B	Tutor Group	Mr S Malmer	<input checked="" type="checkbox"/>	13	19
8A	Tutor Group		<input checked="" type="checkbox"/>	08	0
98A	Tutor Group	Mr S Cox	<input checked="" type="checkbox"/>	09	11

Go

Select Tutor Group(s)

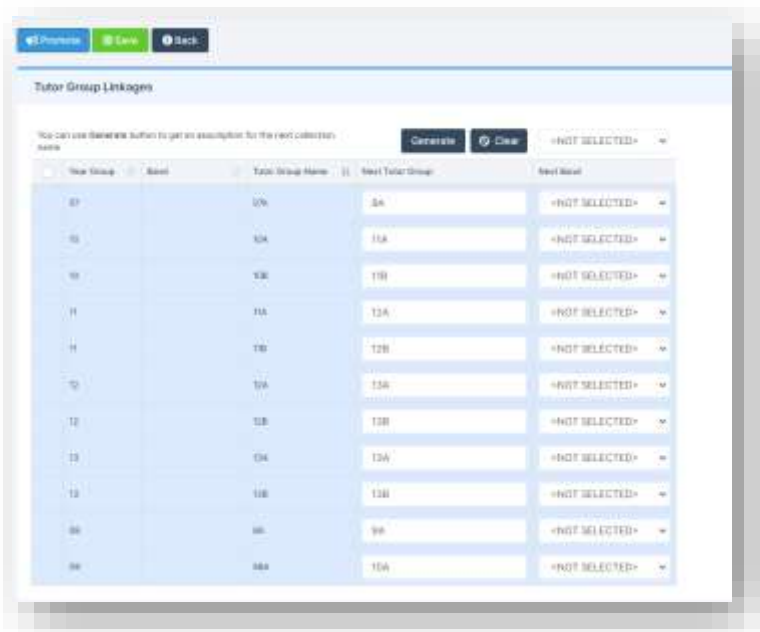
Tutor Group*

Selection List

11 group(s) selected

- 07A
- 10A
- 10B
- 11A
- 11B
- 12A
- 12B
- 13A
- 13B
- 8A
- 98A

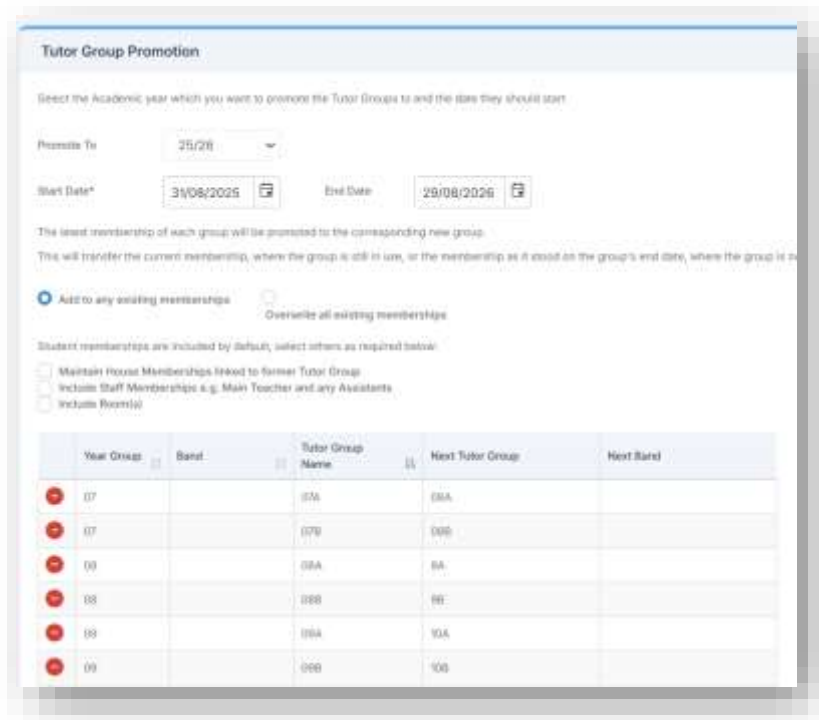
In **Tutor Group Linkages** click the Tutor Groups you wish to **Promote** (they will colour blue) and either click on the **Generate** button for the system to suggest a name for the **Next Tutor Group** **OR** alternatively type in the **Next Tutor Group** name yourself.



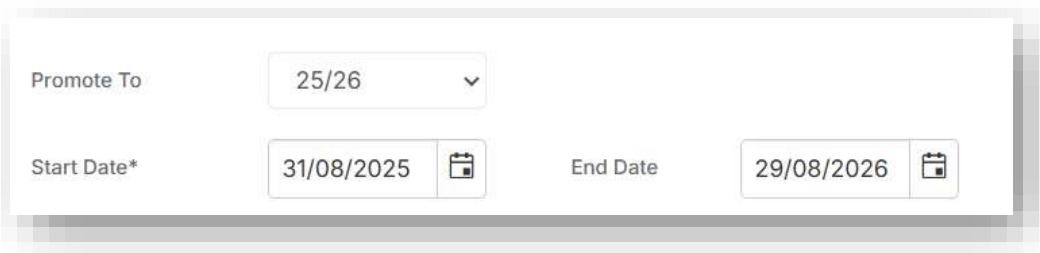
IMPORTANT: Please keep in mind that **this process will create brand new tutor groups** if it cannot find an existing group with the same name. Therefore, **if your tutor group names are remaining unchanged with no end date, please ensure that the names added into the next tutor group field match exactly.**

The changes can either be saved by clicking on the **Save** button and promoted later, or you can move straight to the next step and click **Promote** to continue.

In the next screen you can choose to exclude any of the **Groups** by deleting them from the list using the **Red Delete** button.



Select the **Academic Year** you will **Promote To** from the dropdown list and set the appropriate **Start Date** and **End Date** you wish to give your **Student Memberships** for the next **Academic Year**.



The screenshot shows a form with three main fields: 'Promote To' is a dropdown menu currently showing '25/26'; 'Start Date*' is a date input field showing '31/08/2025' with a calendar icon; 'End Date' is a date input field showing '29/08/2026' with a calendar icon.

As with **Year Groups** you can **Add to existing memberships** (default for safety) or **Overwrite all existing memberships** (if promoting to pre-existing **Tutor Groups** please be aware that the overwrite feature will remove all current memberships that exist within the date range set above).

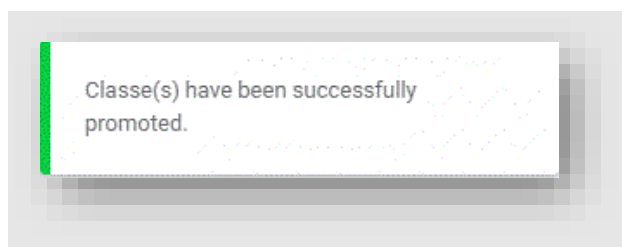
Other memberships can be passed on as well:

- Maintain **House** Memberships
- Include **Staff** Memberships
- Include **Rooms**

The latest membership of each group will be promoted to the corresponding new group.
This will transfer the current membership, where the group is still in use, or the membership as it stood on the group's end date, where the group is no longer active in the system.

Hint: If you plan to merge two **Tutor Groups** (e.g., 11A1 and 11A2 into 12A), note that you cannot assign both to the same new group name in a single promotion round - duplicate names are restricted for safety reasons. Instead, promote one group first, then run a second promotion to move the other group into the same new Tutor Group.

Clicking on the **Go** button will create new group memberships based on the groups they were being promoted from, and the old memberships will be given an end date at the end of the current academic year if they did not already have one.

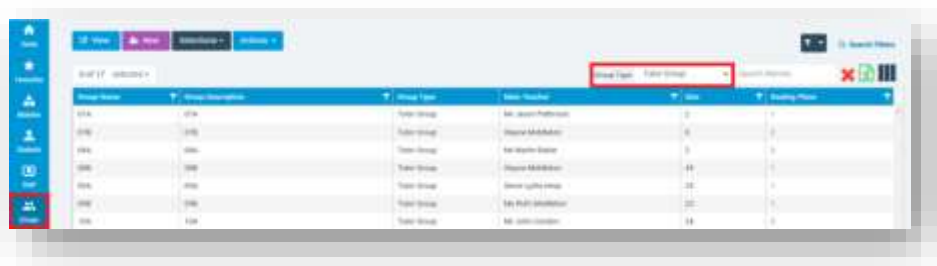


Important: For a further in depth look at **Tutor Group Promotion**, please refer to the following guide – [How to approach Year Group and Tutor Group Promotion](#)

Adding Tutors to Tutor Groups

In this section, you will learn how to assign **Tutors** to **Tutor Groups** and set up the group's timetable. Once completed, **Tutors** will be able to access their **Teacher Dashboard**

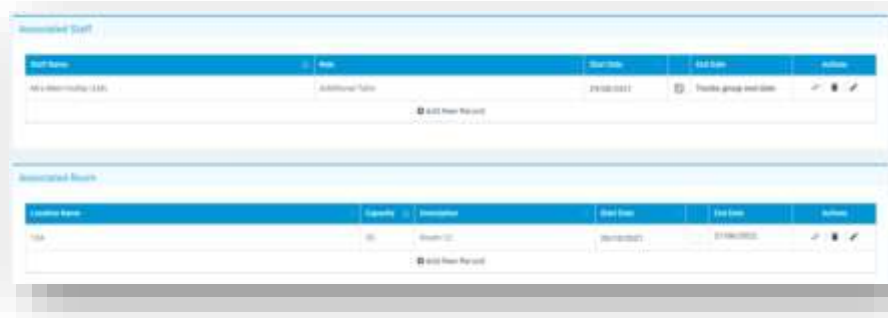
From the **left Menu** go to **Groups** and change the **Group Type** to **Tutor Group** (in a **Secondary School** this will default to **Teaching Class**).



Next, select a **Tutor Group** so it is highlighted blue and then click on the **View** button, you can choose more than one **Tutor Group** and click **Next** to move through several groups.

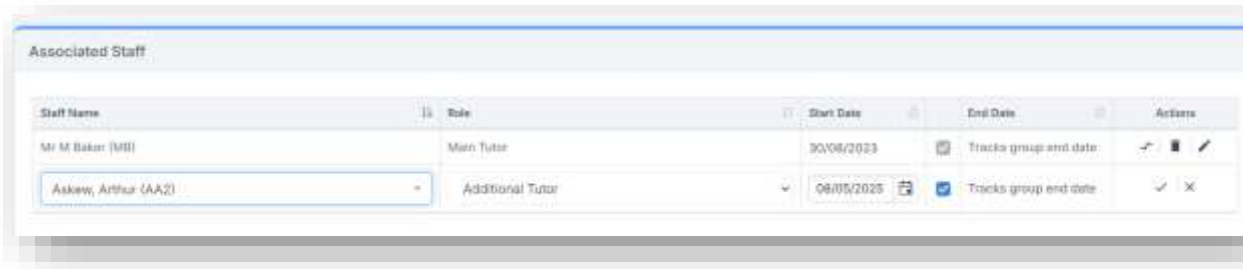


If you are adding a **Tutor to a Tutor Group**, you need to **first** ensure that the required staff are visible in the **Associated Staff** panel.



To add a new member of staff click **Add New Record** in **Associated Staff**.

Once you have added the required **Associated Staff** and the appropriate dates click the **far-right tick icon** under **Actions**.



Staff Name	Role	Start Date	End Date	Actions
Mr M Baker (M1)	Main Tutor	30/08/2023	Tracks group end date	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Askew, Arthur (AA2)	Additional Tutor	09/05/2025	Tracks group end date	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Remember to click the top left **Save**.

Important: Once you have **added your tutors to your tutor groups** you can then generate the **AM/PM** timetables for the new academic year. For more information please see [How to Use the Tutor Group Timetable Generator](#)

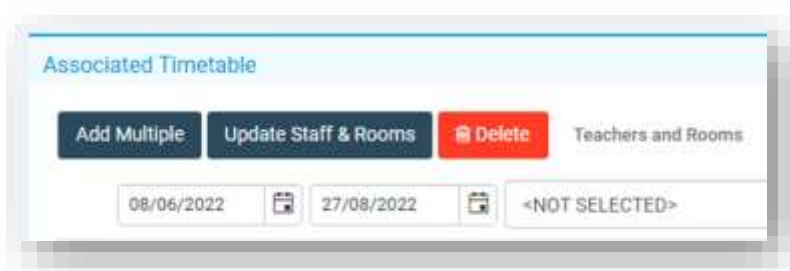
Shared Groups:

- If a group is shared between multiple staff you will need to create the timetables manually by using the **Associated Timetable Panel**. See Guidance Below.
- **IMPORTANT:** Remember to **untick the No 10 in Config > Setup > Daily Maintenance Settings** for this scenario, so the system doesn't update overnight and assign all staff to all days/sessions. See our guide on [Daily Maintenance Settings](#)

Once all the required **Staff** have been added, scroll down to find the **Associated Timetable Panel**.

This panel shows which **Staff** are assigned on which dates for which sessions, this in effect **creates the Lessons Dashboard for the staff**.

To **Add a Member of Staff to Multiple Sessions** in the **Associated Timetable Panel** click **Add Multiple**, which allows you to add a staff member to multiple periods in one process.



Pressing **Add Multiple** opens the following pop out window.

Select the **Staff*** and **Room*** that you wish to add periods for, you can now either use the **table at the bottom of the screen** to add individual periods, or press **Add Multiple Periods**.

Add multiple timetables for OBB

Staff: LM (Mrs Mem Kutlay)

Room: Room 12

Add Multiple Periods

Start Date	End Date	Week Day	Period
08/06/2022	27/08/2022	Week 1 Monday	AM

Cancel Save

Note: Only **Staff** and **Rooms** that are already **Associated** with the **Tutor Group** will be available here.

Add Multiple Periods opens another pop out window where you can select all the periods you would like to add for the required **Start/End Date**.

Note: You need to press **shift** or **control** on your keyboard while you click on periods to select more than one. Pressing **Save** takes you back to the original pop out window.

Add Bulk Timetable Periods

Start Date: 08/06/2022

End Date: 27/08/2022

Timetable Periods

- Week 1 Monday AM
- Week 1 Monday PM
- Week 1 Tuesday AM
- Week 1 Tuesday PM
- Week 1 Wednesday AM
- Week 1 Wednesday PM
- Week 1 Thursday AM
- Week 1 Thursday PM
- Week 1 Friday AM
- Week 1 Friday PM
- Week 2 Monday AM
- Week 2 Monday PM

Cancel Save

You can now see all the chosen periods and if you are happy with them, press **Save**

Add multiple timetables for 08B

Staff*

Room*

Start Date	End Date	Week Day	Period	
08/06/2022	27/08/2022	Week 1 Monday	AM	<input type="checkbox"/>
08/06/2022	27/08/2022	Week 1 Tuesday	AM	<input type="checkbox"/>
08/06/2022	27/08/2022	Week 1 Wednesday	AM	<input type="checkbox"/>
08/06/2022	27/08/2022	Week 1 Thursday	AM	<input type="checkbox"/>
<input type="text" value="08/06/2022"/> <input type="button" value="📅"/>	<input type="text" value="27/08/2022"/> <input type="button" value="📅"/>	<input type="text"/>	<input type="text" value="AM"/>	<input checked="" type="checkbox"/>

Add multiple timetables for 08B

Staff*

Room*

Start Date	End Date	Week Day	Period	
08/06/2022	27/08/2022	Week 1 Monday	AM	<input type="checkbox"/>
08/06/2022	27/08/2022	Week 1 Tuesday	AM	<input type="checkbox"/>
08/06/2022	27/08/2022	Week 1 Wednesday	AM	<input type="checkbox"/>
08/06/2022	27/08/2022	Week 1 Thursday	AM	<input type="checkbox"/>
<input type="text" value="08/06/2022"/> <input type="button" value="📅"/>	<input type="text" value="27/08/2022"/> <input type="button" value="📅"/>	<input type="text"/>	<input type="text" value="AM"/>	<input checked="" type="checkbox"/>

Promoting Classes

Class Promotion isn't required if assigning your Students to Groups with **Bulk Group Assignment** see [How to Use Bulk Group Assignment](#) .

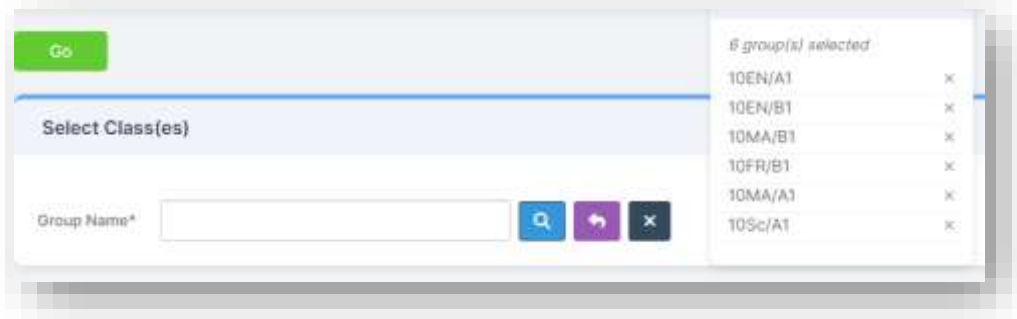
Class Promotion and **Bulk Group Assignment** are an **EITHER/OR** process

Choose from ONE of the following processes.

1. Import new Timetable with new groups for next year then use **Bulk Group Assignment** to assign the Students to the new Classes

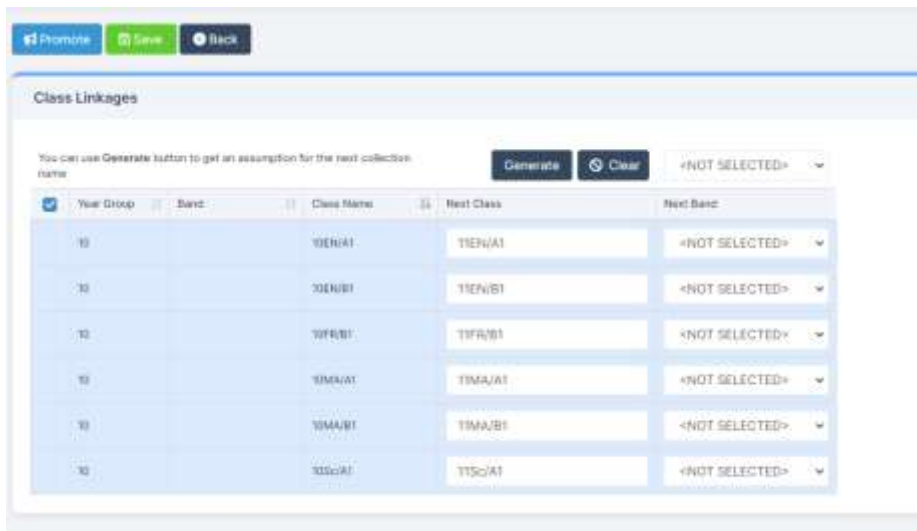
2. Import your new Timetable with new groups for next year then use **Class Promotion** to assign the students being very careful to ensure **Class Names match EXACTLY**
3. Use **Class Promotion** to create your classes and assign students to the new classes.

Go to **Config>Curriculum>Class Promotion**, click the blue find icon to select the **Classes** to be **Promoted** and click on the **Go** button.



Select **the classes in the list** (they will colour blue when selected) then click on the **Generate** button for the system to suggest a name for the next **Class**, alternatively type in the new name.

Note: If you are promoting Students into Classes that already exist you MUST ensure the names match EXACTLY.



The changes can either be saved by clicking on the **Save** button and promoted later, or move straight to the next step and click **Promote** to continue

Select the **Academic Year** you will **Promote To** from the dropdown list and set the appropriate **Start Date** and **End Date** you wish to give your **Student Memberships** for the next **Academic Year**.

You can **Add to existing memberships** (default for safety) or **Overwrite all existing memberships**. Please be aware that the overwrite feature will remove all current memberships that exist within the date range set above).

Other memberships can be passed on as well:

- **Staff**

- **Rooms**

Clicking on the **Go** button will create new group memberships based on the groups they were being promoted from, and the old memberships will be given an end date at the end of the current academic year if they did not already have one.

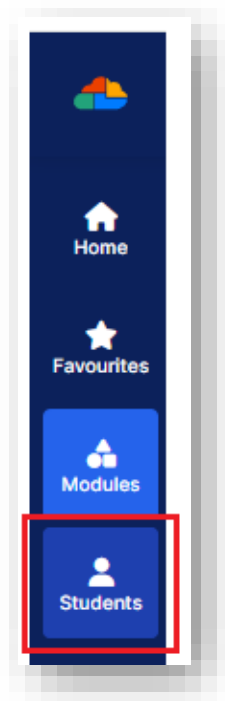
The screenshot shows a 'Class Promotion' wizard interface. At the top, there are 'Go' and 'Reset' buttons. Below is a section titled 'Class Promotion' with instructions: 'Select the Academic year which you want to promote the Classes to and the date they should start'. The 'Promote To:' dropdown is set to '25/26'. The 'Start Date*' is '31/08/2025' and the 'End Date' is '29/08/2026'. A note states: 'The latest membership of each group will be promoted to the corresponding new group. This will transfer the current membership, where the group is still in use, or the membership as it stood on the group's end date, where the group is no longer active in the system.' There are two radio buttons: 'Add to any existing memberships' (selected) and 'Overwrite all existing memberships'. Below this, it says 'Student memberships are included by default, select others as required below:' with checkboxes for 'Include Staff Memberships e.g. Main Teacher and any Assistants' and 'Include Room(s)'. At the bottom is a table with columns: Year Group, Room, Class Name, Next Class, and Next Room(s).

Year Group	Room	Class Name	Next Class	Next Room(s)
07	07A	Ar07/A1	Ar08/A1	
07	07B	Ar07/B1	Ar08/B1	
07	07B	En07/B1	En08/B1	
07	07A	Fr07/A1	Fr08/A1	
07	07B	Fr07/B1	Fr08/B1	

Important: If you have imported a timetable, it is crucial to **enter the new class names exactly as they appear in the timetable**. This ensures that the wizard promotes the students into the classes that have already been created by the timetable, rather than creating more classes and promoting students into them incorrectly.

Please contact the Helpdesk if you need any assistance with this process

Adding New Students

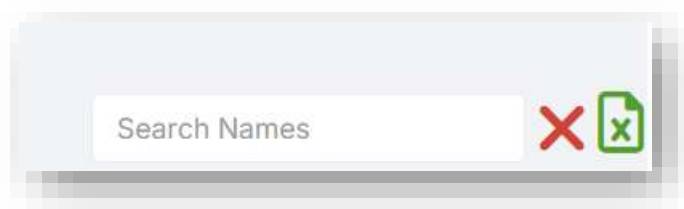


New **Students** can be added by any or all of the options below

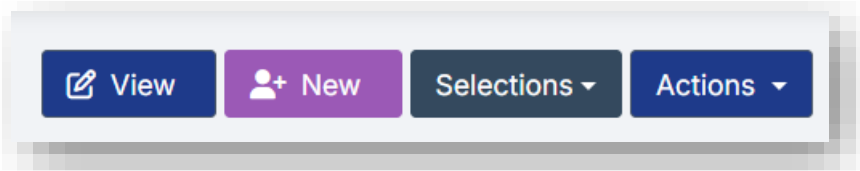
Adding a Student Manually

Click **Students** in the left-hand menu, this will open the **Students List** Page

Tip: Best practice is to check the **Student doesn't** already exist in the database by typing their name into the top right **Search Names** box.



Once you've checked the **Student** doesn't exist click the top left **New** button.



This will open **Create New Student** to enter in the new **Students** information. **Note:** The **Entry Date** defaults to **today's date**, amend if required.

A screenshot of the 'Create New Student' form. The form is titled 'Create New Student' and contains several fields. Two red boxes highlight the 'Entry Date*' field (containing '08/05/2025') and the 'Group Name' field (with a search icon, a back arrow, and a close 'x' icon). Other fields include 'Legal First Name*', 'Legal Last Name*', 'Middle Name(s)', 'Former Last Name', 'Pref. First Name', 'Pref. Last Name', 'Sex*' (dropdown), 'Date Of Birth*' (calendar icon), 'Birth Certificate' (checkbox 'Seen'), 'Age', 'Student Type*' (radio buttons 'On Roll' and 'Pre-Admission'), 'Enrolment Status*' (dropdown 'Current (Single Regist)'), 'Admission No*' (text 'S0433A'), 'Attend Mode*' (dropdown 'All Day'), 'Sessions per week*' (text '10'), 'Chronological YG', 'Curriculum Year Gp*' (dropdown '<NOT SELECTED>'), and 'House' (dropdown '<NOT SELECTED>'). At the bottom, there is a checkbox 'Data processing consent has been granted' and three buttons: 'Save' (green), 'Save & Add Siblings' (blue), and 'Cancel' (red).

Group Name, if known either type in the name of the Tutor Group or click the blue spy glass to open the Group Selector and choose the required Tutor Group.

House

- If the **Tutor Groups are attached to Houses** there is **no need to choose the House** as it will link from **Tutor Group Memberships** in Groups>House>View>**Tutor Group Membership**
- If the **Students are attached to Houses** in Groups>House>View>**Student Membership**, then choose the House from the dropdown choices
- Best practice in Groups is to **EITHER link Houses to Tutor Groups OR Student Memberships**, not both.

Fill in the details and click on the **Save** button, this will now open the **Student Details** page on the **Profile Tab** where additional information can be added. All fields marked * must be completed.

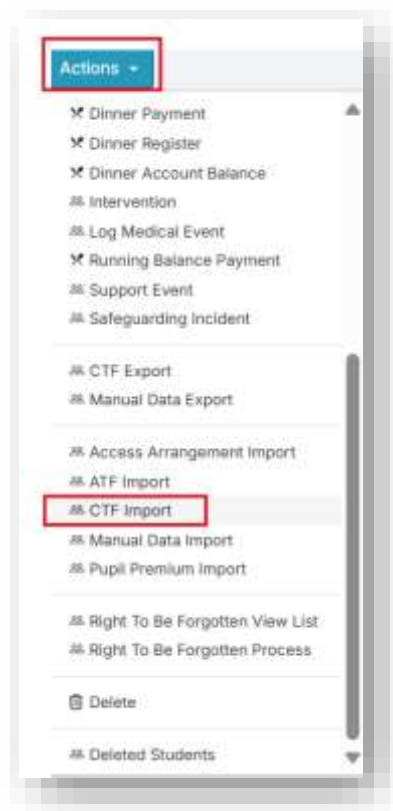
For more information see [How to Add a Student](#)

CTF Import

Note: You will need a valid **CTF file** to carry out this process

Click on **Students** in the left-hand menu to open the **Student List** page.

Then from the **Actions** drop down click **CTF Import**, you do not need to select any **Students** in the **Student List** page



This will open the **CTF Import** page.

CTF Import

Select the file that you want to import from and then complete the choices below

Browse Choose a file

- Student Basic Details
- SEN Information
- Student Optional Identifiers
- Assessment Data
- Early Years-Foundation Stage
- Key Stage 1
- Student Contacts
- Looked After
- FSM History
- Y1 Phonics Check Data
- Key Stage 2
- Student Addresses
- School History
- HAW Details
- Student Births
- Key Stage 3

In case of existing students, use CTF to: Complete Missing Data

Select the text format to apply to names: Use Initial Capital Letters for all

If the file contains new students (i.e. any that are not already recorded in the database), should they be placed into: On Roll

Enter Admission Date: 08/05/2025

If the file contains LEAVER students (i.e. any that are already in system with a date of leaving) should they be: Excluded from import

Data relating to existing students will automatically be applied as appropriate.

Cancel Next →

Click on the top left **Browse** button to navigate to the **CTF Import file saved to your PC**, select it, and click on the **Open** button.

For the **Complete Missing Data/Overwrite** drop down choices;

- **Overwriting** will replace the data that is present for that **Student** in the system with the data included in the **CTF**, where the information is different, so should be approached carefully.
- **Complete Missing Data** will use the **CTF** data to complete any missing parts of the **Student's** record.

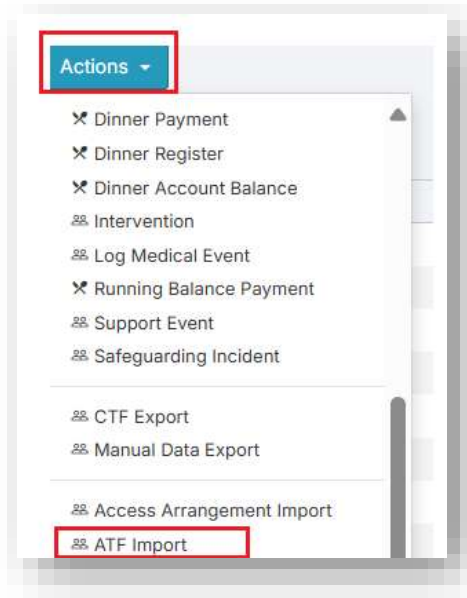
Then enter in the date for **Enter Admission Date*** for when the new **Student(s)** will be starting. This will **default to today's date**.

Once you are happy, click on the **Next** button, check the data, and then click on the **Import** button to Import the **Students** into the system.

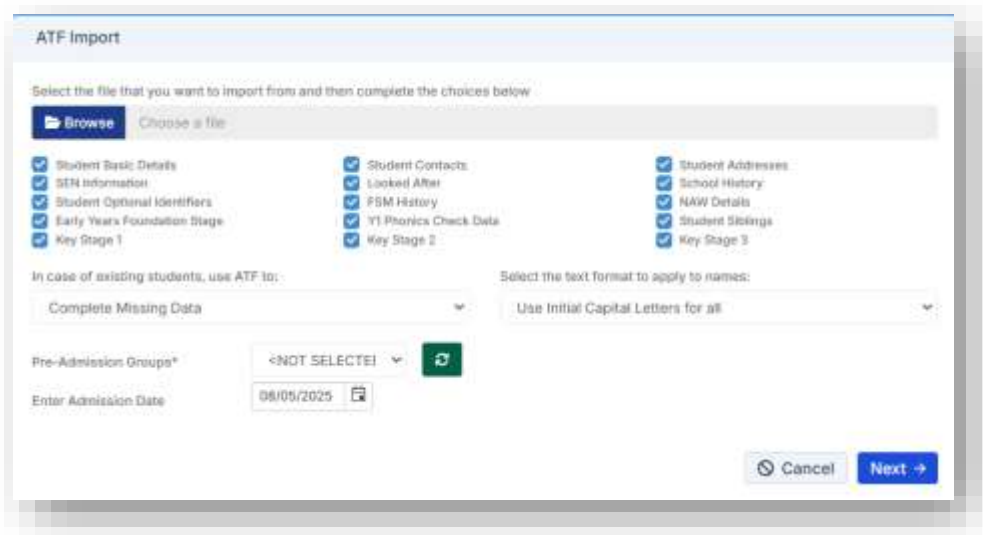
For more information see [How to Add/Update Students with a CTF Import](#)

ATF Import

Go to the **Students List** page and from the **Actions** dropdown click on the **ATF Import** button.



This will open the **ATF Import** page.



Click on the top left **Browse** button to navigate to the **ATF Import** file saved on your PC, select it, and click on the **Open** button.

Next, select the **Pre-Admission Group*** you wish to import students in to, this will remove the **Enter Admission Date** box as the **Admission Date** will be coming from the **Admission Date** defined in the **Pre-Admission Group**.

Once you are happy, click on the **Import** button to **Import** the **Students** into the system.

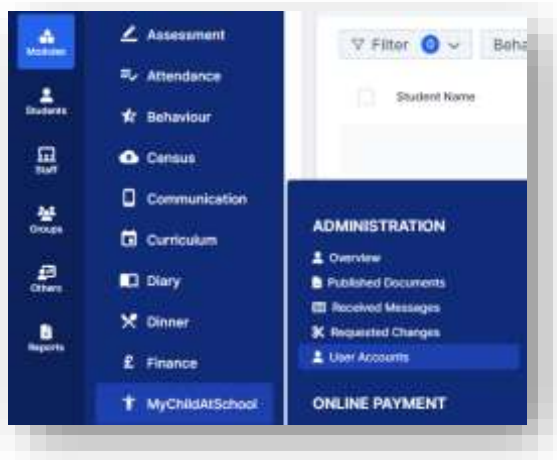
For more information see [How to Add Pre Admissions Students using ATF and CTF Imports](#)

Student Leavers

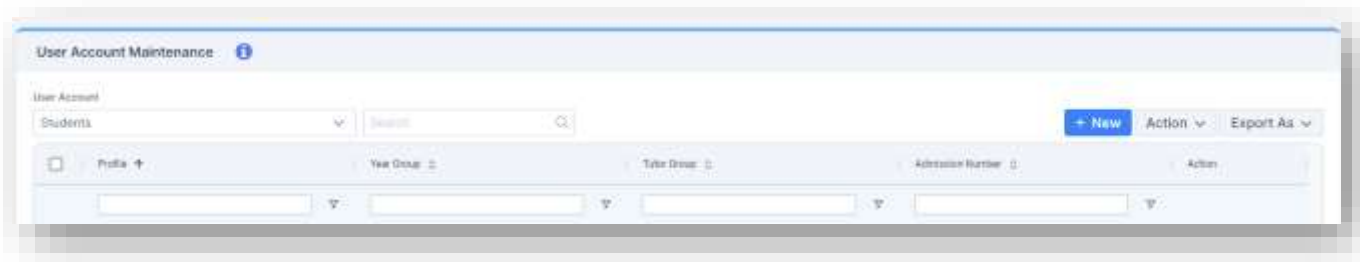
If you have any questions on making **Students Leavers**, please see the following **Guide**: [How to Process a Leaver](#)

Creating New MyChildAtSchool

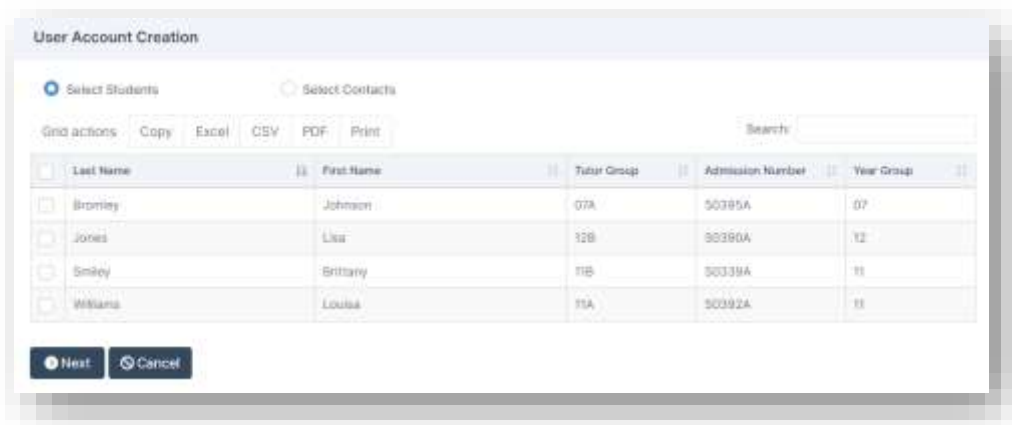
Complete this section if you use **MyChildAtSchool** otherwise, move straight to [Data Archiving](#).



If you use **MyChildAtSchool**, go to **Modules>MyChildAtSchool>User Accounts**.

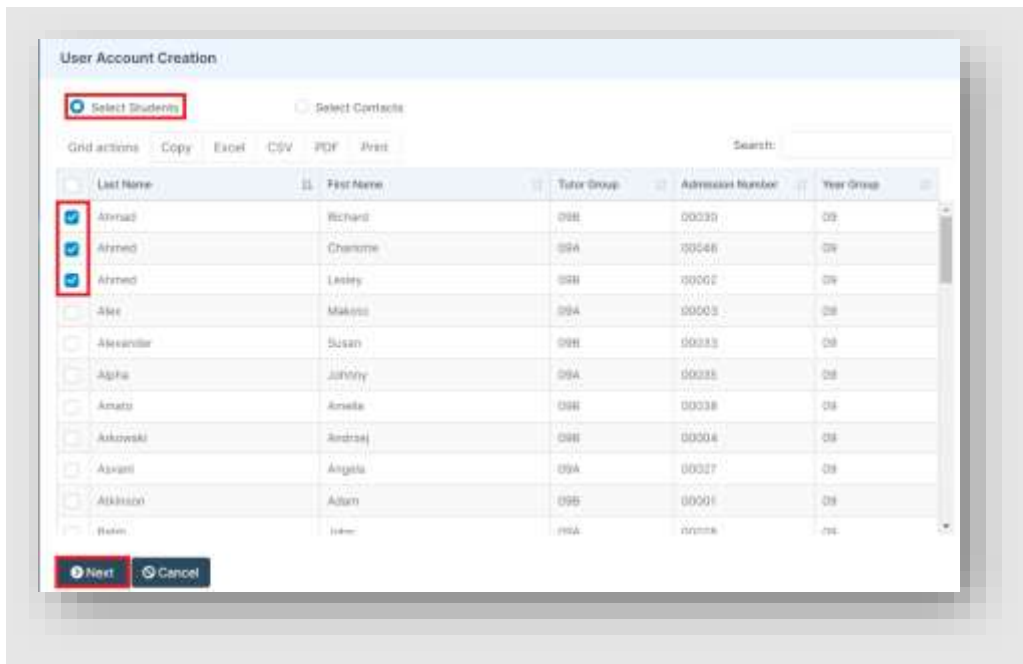


From the **User Account Maintenance** page click **New** to get to the **User Account Creation** popup.

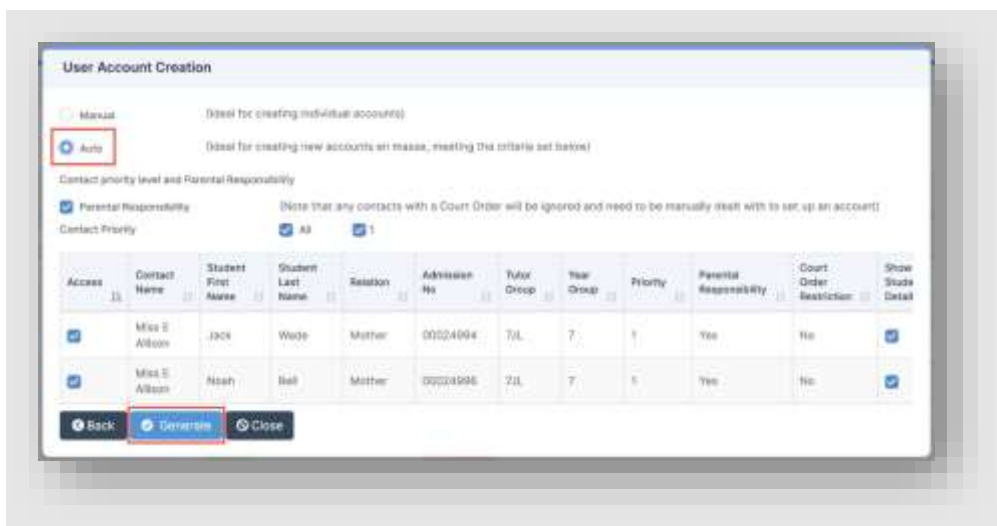


Choose **Select Students** to see a list of the **Students** that are not linked to an MCAS Account

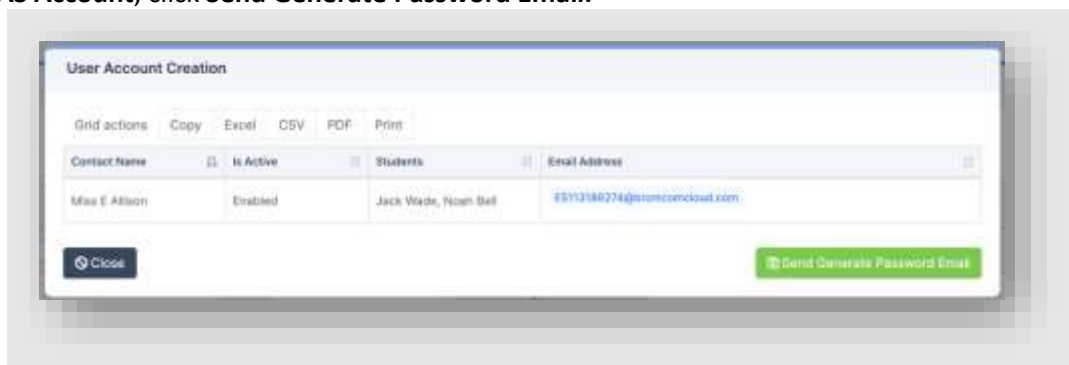
Select the required **Students** and click **Next**.



Important: Manual or Auto: If you are creating several **Accounts** at the same time, select the **Auto** radio button. If you want to create **Accounts** for only one **Student** you can select either **Auto** or **Manual**.



Once you press **Generate**, you will receive a **success notification** and you will see a list of the **Contacts** who now have an **MCAS Account**, click **Send Generate Password Email**.

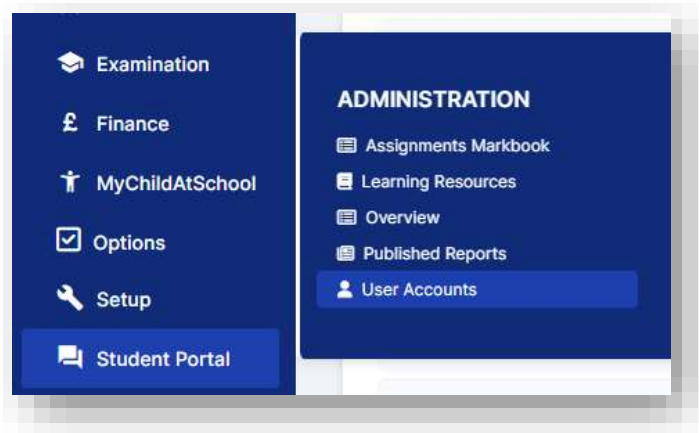


For more information see [How to Create New MCAS Accounts](#).

Creating New Student Portal Accounts

Without Single Sign-On

Go to **Modules>Student Portal>User Accounts**



Once this page loads, any existing **Student Portal User Accounts** will show on the page as seen on the example below.

User Account Maintenance

Grid actions: Copy, Excel, CSV, PDF, Print

Admission Number	Last Name	First Name	Tutor Group	Year Group	Username	Windows Account Name	Recovery Email	Email Verified	Invitation Code	Active
00000	Ben-Hurth	Saina			Ben-Hurth250			No	8F8848854F	Yes
00001	Abdulrah	Maria			Abdulrah245			No	4D797D43	Yes
00002	Aboulsam	Kami			Aboulsam249			No	00CF8A548	Yes
00003	Adams	Egbe			Hq		Hq@stroom.com	Yes		Yes
00004	Adly	Tracy			Adly255			No	3E3C87DF48	Yes
00005	Adelise	James			Adelise257			No	4C40857D48	Yes
00006	Agara	Elizabeth			el			No	F07756F341	Yes
00007	Simpson	Dafka			SRAP5403			No	C07B4644C	Yes

In this example, we have started with a blank setup so that the full process can be shown, and a first time set up for **Student Portal User Accounts** is displayed.

User Account Maintenance

Grid actions: Copy, Excel, CSV, PDF, Print

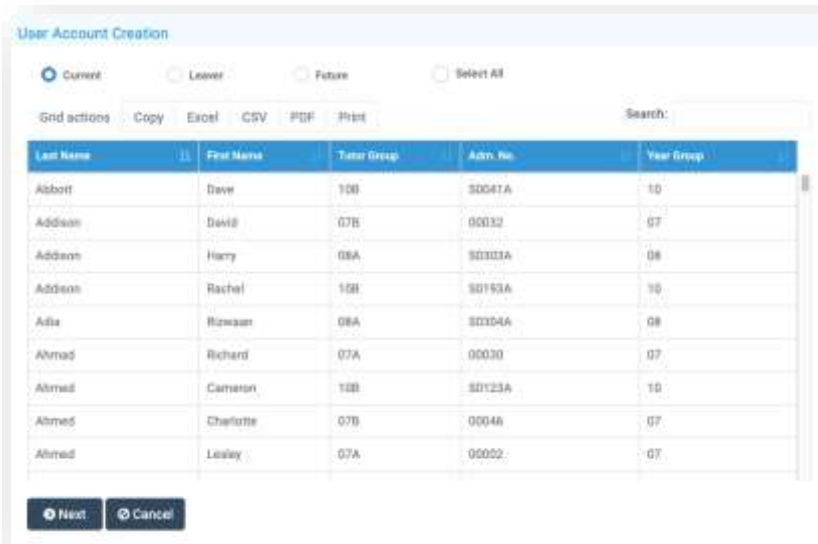
Admission Number	Last Name	First Name	Tutor Group	Year Group	Username	Windows Account Name	Recovery Email	Email Verified	Invitation Code	Active	Status
No data available in table											

Once the **User Accounts** page loads, it will be blank because there are no existing **User Accounts** yet. From here, press **New**.

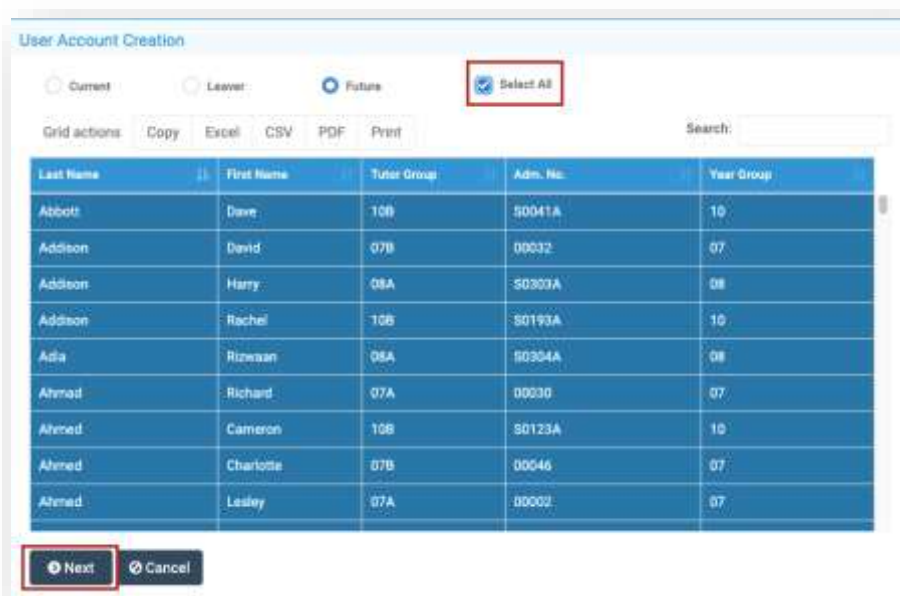
Once you press **New**, this will open a new section where all of the Students without **User Accounts** are displayed, and you have the following options:

- **Current** - This option refers to Students who are currently on Roll.
- **Leaver** - This option refers to Students who have been processed as Leavers.
- **Future** - This option refers to Students who have a future start date/will be joining.

Set this to **Current** and it will provide you with all the on-roll Students without accounts yet.

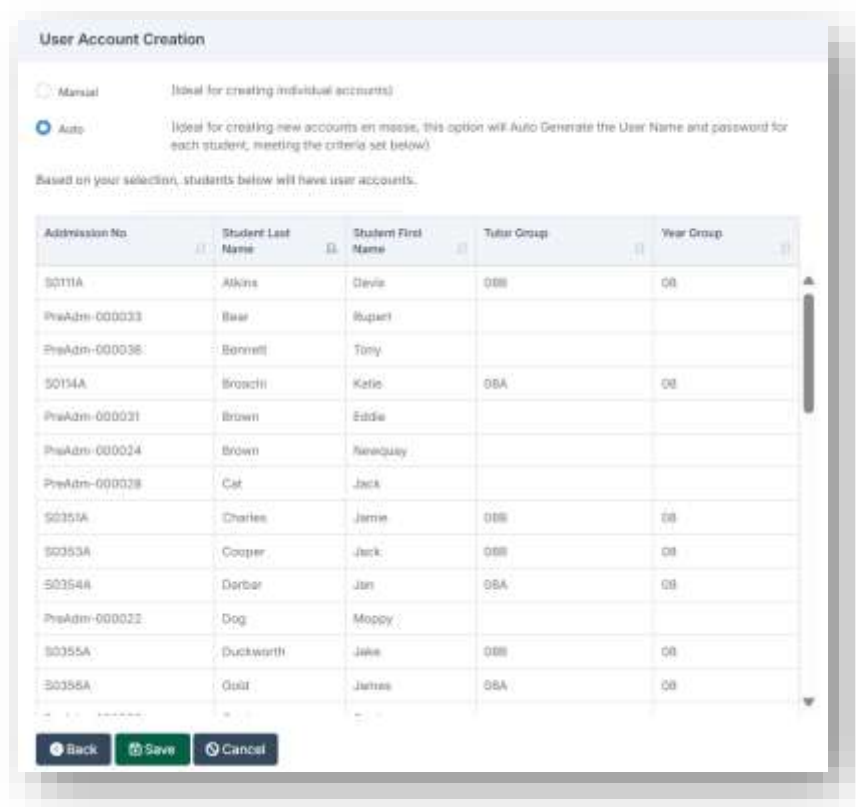


From here, you can either use the **Select All** option or individually click on the specific Students you want to create **User Accounts** for and press **Next**.



Once you press **Next**, this will take you to the account generation page where you can select to **Auto** or **Manually** Generate the Accounts.

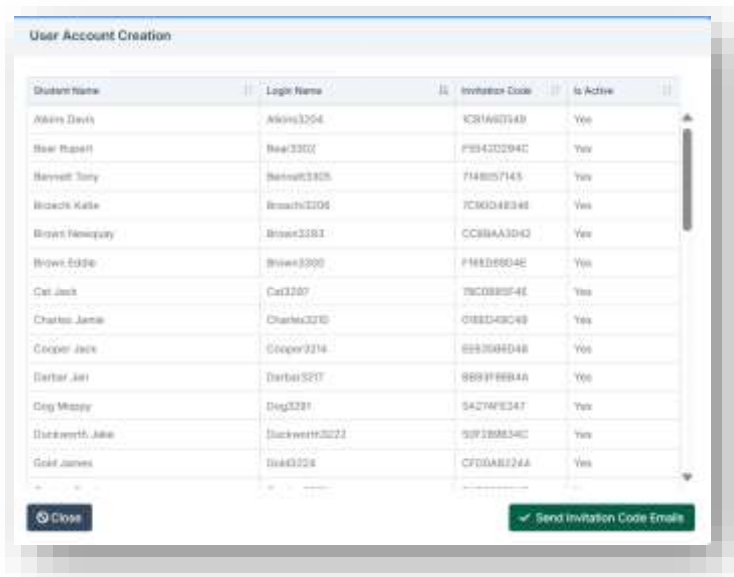
It is recommended here to use **Auto**, especially if you are doing this in bulk. This means that the format of the User Accounts is consistent, and the process is more efficient.



When you are ready press **Save**.

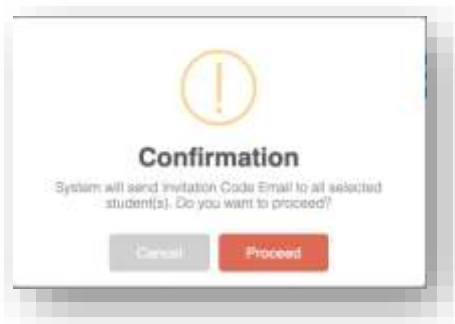
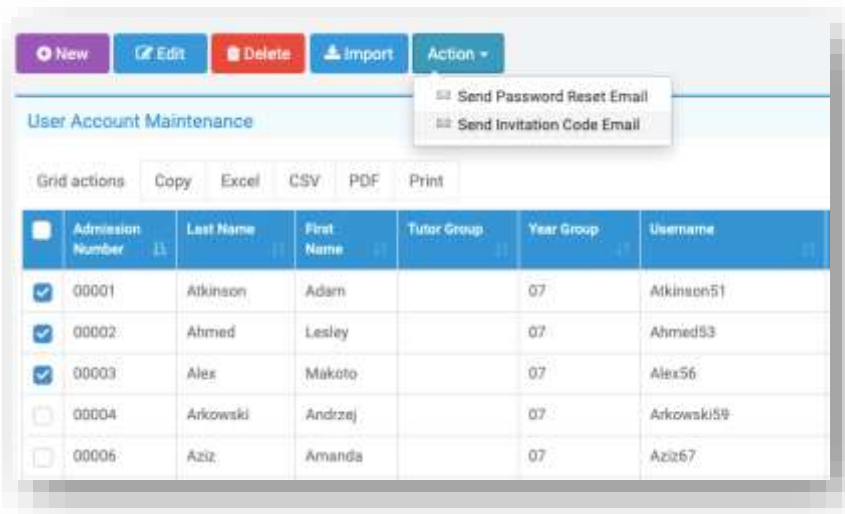
Pressing **Save** takes you to the final step where the Accounts have been created.

You can choose to **Send the Invitation Code Emails** at this point or press **Close** and send the Emails in your own time.



When you return to **Modules>Student Portal>User Accounts**, all Students with User Accounts will now be visible.

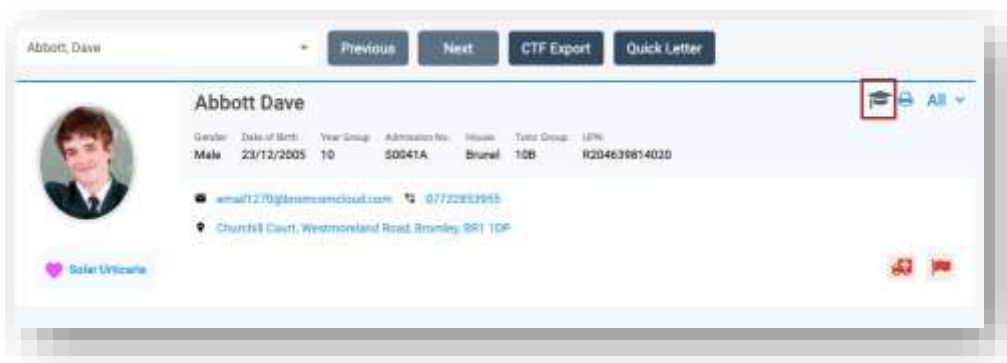
If you did not send the **Invitation Code Emails** in the last step of the process, you can now send the Emails from **Modules>Student Portal>User Accounts Page** under **Action** as seen below.



You will now also see that when you open a Student's Record, the **Graduation Cap** on the top right of their record is now **Green**.

Previously this will have been **Grey** before a **User Account** was created for them.

Student **without** a User Account



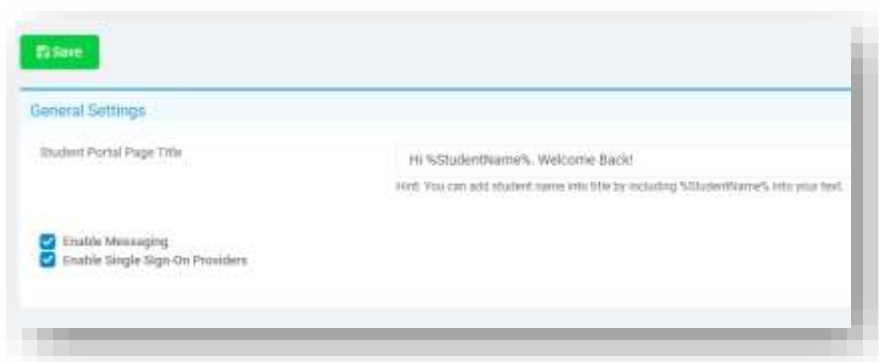
When it is **Green**, you can click on this to preview the Student's **Student Portal** account.

Student **with** a User Account

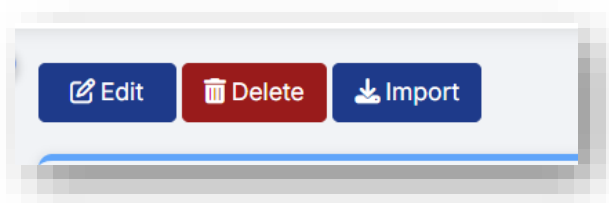


With Single Sign-on

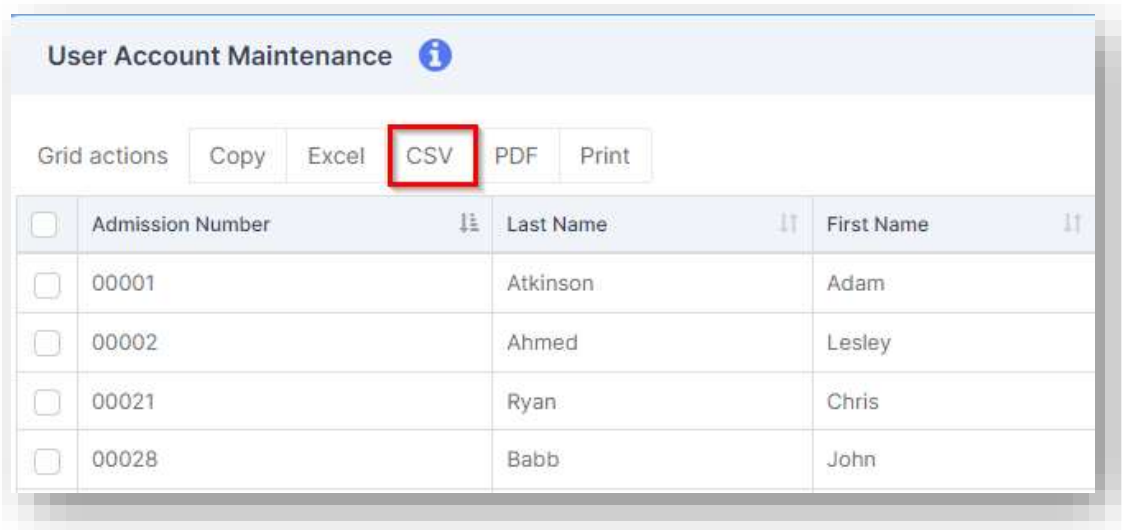
If you are creating Student Portal **User Accounts** and you have enabled the option for **Single Sign-On Providers** within **Config>Student Portal>General Settings**, then the process is a little different.



When you are on **Modules>Student Portal>User Accounts**, you will **ONLY** be able to **Import** new **User Accounts**, not create them manually.

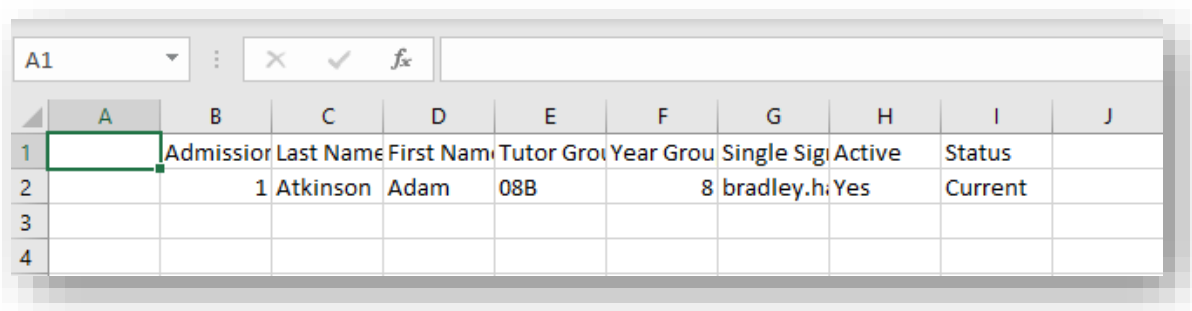


To obtain the correct template which allows you to **Import User Accounts**, use the **CSV** Button highlighted below.



This will export the existing list of User Accounts to your PC as a CSV Download.

It is **crucial that you do not amend the Headings** within the file otherwise the Import will not work.



Leave the Headings as they are and populate the fields below them correctly for each Student and save the file.

Once the data has been entered, you will be able to **Import** the CSV File on the **User Accounts** page, which will create the User Accounts for you.

Note: New **User Accounts** need to be linked to an Office365 or Google Email Address to use Single Sign-On.

For more information see [How to Create Student Portal User Accounts](#)

Clubs, Trips & Wraparound Care

Please see below for guidance on best practice when setting up **Clubs, Trips** and **Wraparound Care** for the **New Academic Year**.

- To Create your clubs/trips for next year, firstly you must ensure that the new academic year has been created (dates and academic days can be changed later if not yet known exactly). See [Academic Year](#) in this guide.

- For trips ensure that the **end date of the group falls after the trip itself takes place, ideally giving enough time for all payments to be chased/collected. You may encounter issues if trying to process payments once the end date of the group has passed.**
- We recommend removing the Trip from MCAS once all parents required have signed up. This can be done by removing the 'Live on MCAS' dates within the Additional Group Details panel of the Trip.

Wraparound Care

When setting up a **Wraparound Care (Running Balance) club**, we recommend **not entering an end date** initially. This allows the club to be reused across academic years without needing to recreate it each time.

If you decide to close the club in the future, you can do so using the **Terminate Club** button in the *Basic Group Details* panel.

⚠ **Important:** Once an end date is set, it cannot be removed, meaning you'd need to create a new one – requiring any outstanding balances to be manually transferred. By keeping the same club active and simply updating the schedule each year, all balances remain in tact and usable.

Data Archiving and DMS Storage

This section will assist you with **Archiving** the oldest **Academic Year** in your MIS and how to manage the **DMS Storage** linked to your MIS.

Data Archiving



Please note that this process is **IRREVERSIBLE** so ensure you have reviewed the process carefully before completing.

Please call the Helpdesk on 020 8290 7177 if you have any questions.

To see the previous **Academic Years** that have been archived on your system, go to **Modules>Setup>Data Archiving**. It may show nothing if this is the first time you are performing this process.

Year	Archived Date	Archived By
No data available in table		

The **Archiving** process, and which **Academic Year** will be processed, will be displayed on the **Data Archive Configuration** page. From here you can also review exactly what will be archived and what will be **permanently deleted** from your MIS.

This process will archive oldest academic year in the system: 2012

The following data will be transferred to archive tables and removed from the system:

- Attendances (AM/PM & Class)
- Assessment Results
- Behaviour Events
- Exam Results

The following data and their links will be deleted from system permanently for selected academic year:

- Groups, Memberships and Timetables (inc. Classes & Tutor Groups)
- Cover Data
- Exams Data
- Detentions
- Academic Year Calendar
- Attendance Comments
- Student's Planning Learning Hours
- Support Timetables

Data transferred into archive tables can be accessed and reported via Reporting module's ARCHIVE section

This process is IRREVERSIBLE! Please enter your password below and click the 'Archive Now' button to start the archiving process!

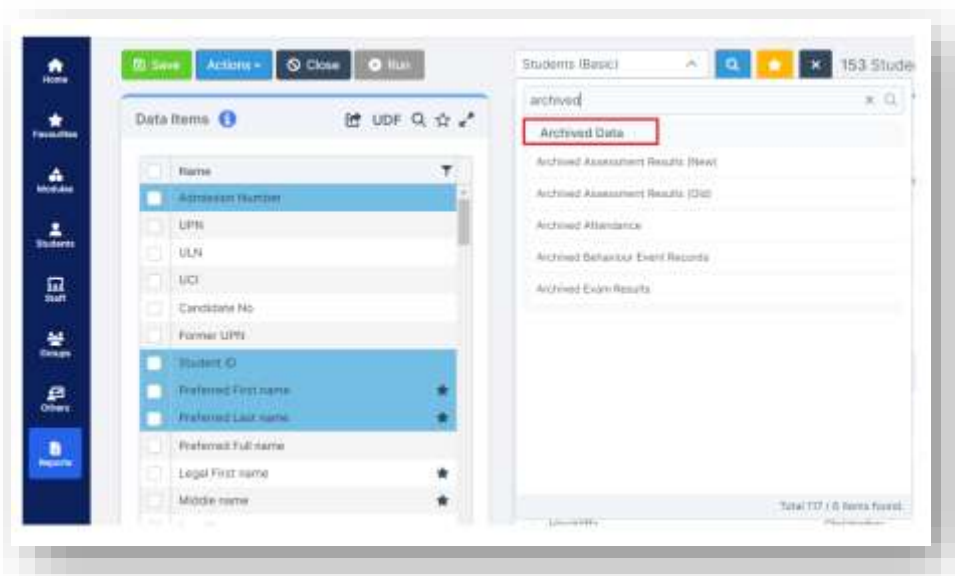
Once you have reviewed and are happy to proceed, you will need to enter your **MIS Account Password** before clicking on the **Archive Now** button.

The process will run and take you back to the previous screen with a confirmation message at the top of the page. This will indicate that the process completed successfully and now you should see the **Academic Year** you have just archived in the **Archive Years** list.



Year	Archived Date	Archived By
2010	04/06/2020	B Handyside

You can also access reports on **Archived Data** from **Reports > Quick Reports** and select the **Archived Data** domain.



DMS Storage

You should also review your **DMS Storage** and remove any reports/documents that are no longer needed. Please refer to the **Managing the DMS** guide that is available in the **Documentation Centre**: [How to Manage the DMS](#).

This is the end of the **End of Year Guide for Secondary School 2024-2025**

If you have any issues or queries, please do not hesitate in contacting whoever you contact for Support.

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