Rolling to a New Academic Year - Part 1

*these steps can be completed prior to the completion of the school year

**STEP 1: Academic Year**

From the Admin Main navigate to Academic Years. (Admin Main > Academic Years)

Select “Create New Academic Year,” locate “2018-19” from the list and mark the status as “Future.”

Several items can be copied from the current year to the new year. All items are checked by default. Uncheck any items that you intend to rebuild from scratch in the new year, keeping in mind that changes can be made to items once they’ve been copied.

Select “Create.” You will be redirected to the “Academic Years” page where “2018-19” will be listed as “future.”
**STEP 2: Calendars**
Navigate back to the Admin Main and select Calendars. (Admin Main > Calendars)

In the academic year dropdown, select “2018-19. There should be a message stating that no calendar exists. Select “Create Calendar.”

Complete the calendar fields, ensuring that the dates are for the 2018-19 academic year. Then select “Create Calendar.”
**STEP 3: Grading Periods**

Navigate to the Admin Main and then to Grading Periods. (Admin Main > Grading Periods)

Ensuring you are in the 2018-19 academic year, edit each of the grading periods and add dates. If any grading periods are missing, use “Create Grading Period” to create them.
**STEP 4: Promote Students**

Navigate to Admin Main and then to Student - Multi View.  
(Admin Main > Student - Multi View)

Switch to the 2017-18 academic year. Select “Promote/Transfer Students.”

Select “Promote/Retain students within a building.”

On the new page, ensure the first line reads “Next Academic Year: 2018-19” and the second line reads “Next Grade Level: Increment by 1 Grade Level.”

The remaining fields are optional and left blank by most schools.

All students, with the exception of your highest grade level, are automatically checked below. If some of the students are not going to be promoted, or if some of them will not be at your school in the 2018-19 academic year, you can uncheck them from the list.

If all students that are to be promoted by one grade level are checked, you can select “Promote Students.”

*Note: If you have students who are being retained a year, you can uncheck them and promote the rest of your students. You will then need to complete this process again, but this time only select students from the list that are being retained, and select “Keep the Same Grade Level” from the “Next Grade Level:” dropdown.
**STEP 5A: Schedule** (has bell schedule)

Navigate to the Admin Main and then Scheduling. (Admin Main > Scheduling)

*If you go to the schedule page and see the following message, please skip step 5 and move on to step 5B.

Select “Copy Schedule.”

**Copy Schedule From:** 2017-18  
**Copy Schedule To:** 2018-19  
**What to Copy:** Keep all boxes checked

Select “Copy Schedule.”

Navigate to Scheduling > Cycle Days > Assign Cycle Days. Mark the first cycle day and then use the icon to mark the rest. Check dates around holidays and make changes as necessary. Then go to step 6.
STEP 5B: Schedule (no bell schedule)

Navigate from the admin main to Classes/Sections and switch to the current academic year. Select “Copy Classes.”

Select the classes to be copied.
- On windows, hold CTRL and click multiple classes. CTRL+A selects all classes, CTRL+Shift and click selects all between two clicks.
- On macs, hold Command and click multiple classes. CMD+A selects all classes, CMD+Shift and click selects all between two clicks.

Select the 2018-19 academic year to copy to.

Click “Create grading periods if necessary.”

Copy

STEP 6: Copy Lunch Data
Navigate to Admin Main > Lunch > Food Items

Verify that food items were copied. Use the “edit” link to make changes and “Create Food Item” to add new items.

STEP 7: Schedule Classes
Schedule classes and create rosters for next year using your preferred method.
Rolling to a New Academic Year - Part 2

*Complete these steps after completion of the school year

**STEP 8: Instructor Cleanup**
Navigate to Admin Main > Instructors

“Edit” instructors who will not be returning and change “Active” to “no.” This will prevent future access to the system.

![Active: No](image)

Use “Create Instructor” to add new instructors that will be starting next year.

**STEP 9: Fee Rollover (if applicable)**
*do this after all payments have been entered for the current year

Navigate to Admin Main > Tuition/Fees > Account Rollover

Select the current and next academic year. Select the account to transfer.

Select students and rollover accounts.

![Account Balance Rollover](image)

**STEP 10: Close Current Academic Year**
*This should be done after you are completely finished with the year.

Admin Main > Academic Years > “edit” current academic year

Change status to “Closed” and save.