

## **PHOENIX GOLD**

## **Annual Update and End of Year Processes**

### **Introduction**

This helpsheet is a **guide** to the end of year processes required for rolling your Phoenix database into the next academic year.

**All the processes mentioned are explained in greater detail by PRESSING F1 when in Phoenix, for ON-LINE HELP at any point.**

This helpsheet describes the following processes: -

1. <b>Leavers Categories</b>	Check that next year's category is set
2. <b>Current Year Groups</b>	Check next year's settings
3. <b>New Intake Groups</b>	Check Year Group on entry
4. <b>Check Associated Schools</b>	Check DfES and LEA codes
5. <b>Check Reasons for Leaving</b>	Check that all reasons are matched to DfES codes

*Items 1 – 5 are check processes.*

6. <b>Pupil/Student Transfer. Export Leavers.</b>	a)By mini datafile. b)By CTF.
7. <b>Pupil/Student Transfer. Import New Intake.</b>	a)By mini datafile. b)By CTF.

A separate helpsheet, Pupil Transfer EoY processes, describes these procedures and is available on the ICT web-site at <http://ictsolutions.norfolk.gov.uk/phoenix/phoenixmain.asp>

*Item 6 and 7 can be processed before rolling over to the new Academic year. The export will create a mini datafile (or common transfer file for non Phoenix schools) containing all pupil data including assessments, for import to Phoenix feeder schools. It is a DfES requirement that pupil data is transferred electronically.*

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| 8. <b>Set up next year's registration groups (classes/forms)</b>     |
| 9. <b>Enrol pupils/students into next year's registration groups</b> |

*Items 8 and 9 are set up processes for next year's classes.*

*Items 1 to 9 can be done before the Annual Update.*

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|--|---|
| 10. <b>Renaming your old datafile for access in the coming year.</b> |   |
| 11. <b>The Annual Update.</b>  | <b>Nursery, First and Junior Schools.</b> |
| 12. <b>The Annual Update.</b>  | <b>Middle Schools.</b>                    |

*Items 3 to 9 must be completed before the Annual Update can be started.*

<p><b>Before undertaking Item 11, the Annual Update, please backup your datafile. Rename the backup so that it is clearly identifiable as the final backup for the current Academic year Login as System Administrator and ensure no other Users are logged on.</b></p>
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**THE ABOVE PROCESSES, ARE EXPLAINED IN GREATER DETAIL IN THE FOLLOWING PAGES.**



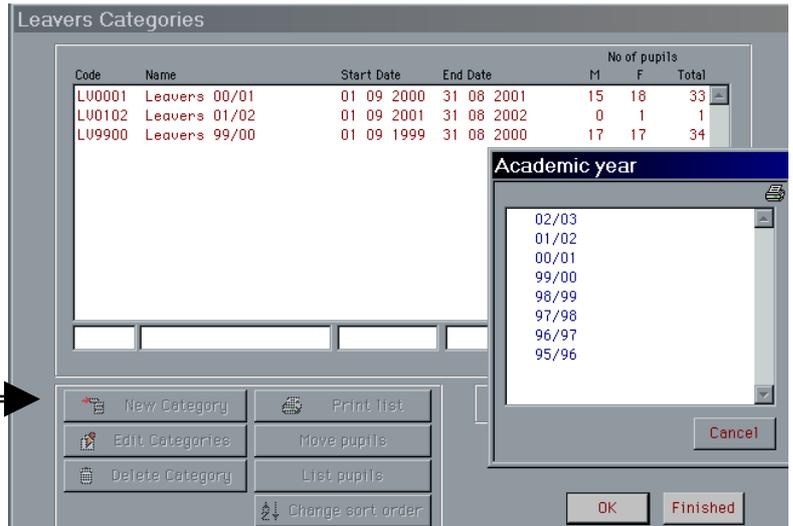
### 1. CHECK Leavers Category in Pupil Groups

The following checks are made in Pupil Groups.

A Leavers Category for the next academic year must be set up.

Go to Pupil Groups > Leavers categories.

If you do not have a category for 02/03, click on the New Category button, select 'by year' and choose 02/03 from the list supplied.

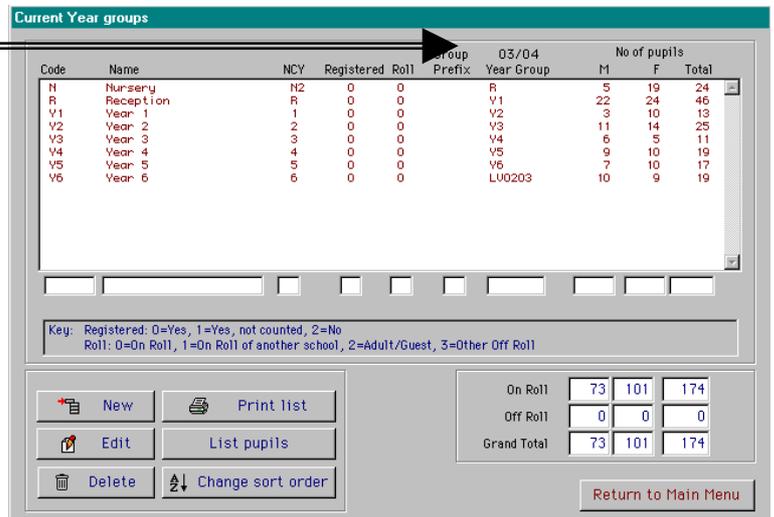


### 2. CHECK Current Year Groups in Pupil Groups

The transfer year group for next year must be set.

Go to Pupil Groups > Current Year Groups.

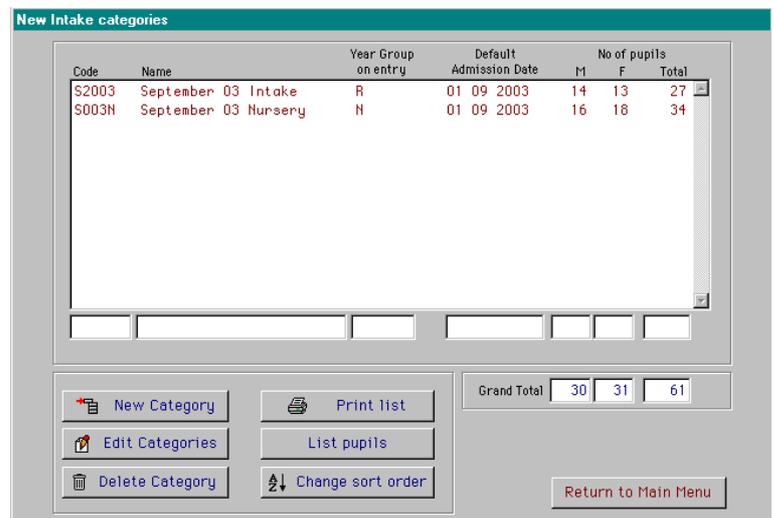
Check that all current year groups are moving to the correct 03/04 year group.



### 3. CHECK New Intake Groups in Pupil Groups

The **Year Group on Entry** for **ALL** Intake groups must be set even if there are no pupils in some groups.

Go to Pupil Groups > New Intake Categories.



#### 4. CHECK Next and Feeder Schools in Associated Schools.

In Phoenix, from the Main Menu, go to Associated schools > Records

Click  and search on the name of the Destination school that the pupil is transferring to, or Feeder school, if the pupil is moving to your school.

Ensure a tick is placed in the *Next School* and/or *Feeder School* box.

Click **Edit** if you need to modify these fields.

If the DfES and LEA codes are incorrect or missing, select the Dropper tool. 

From the list displayed, double click the correct school to update your records.

#### 5. CHECK Reason for Leaving Codes in Pupil records > Lookup Tables > Reasons for Leaving

*Reasons for Leaving codes must be correctly cross-referenced to a DfES category. If your local leaving categories are incorrect, the best solution is to delete your old codes and create new ones.*

In Phoenix, from the **Main Menu**, go to Pupil Records > Lookup Tables > Reasons for Leaving.

**Highlight** each Local Category in turn, from the list on the left and Delete.

Click on **Copy Standard Categories** to copy all new codes.

**Delete** from the new local categories any that do not apply to your school.

6. **Export Leavers ~ Transferring pupil data to another school.**
7. **Pupil/Student Transfer ~ Import New Intake.**

It is a DfES requirement that pupil data is transferred electronically.

The export process creates either a mini, or CTF datafile of leavers details, including assessment records and attendance information. The datafile is transferred from the feeder school to the destination school using Anycomms, and then imported into Phoenix..

Transferring data by this method is of benefit to both feeder and destination schools. Additional transfer files containing the latest pupil assessments and attendance details can be created by the feeder school, and transferred to the destination school for import to Phoenix. Pupil records are automatically updated by Phoenix.

The **mini datafile** can be imported into a Phoenix receiving school prior to, or following, the annual update. All, or selected pupils in a year group/s can be exported. The **CTF** file is for transferring pupil data to a Non-Phoenix School.

Please refer to helpsheet\_Pupil Transfer EoY processes available on the ICT web-site at <http://ictsolutions.norfolk.gov.uk/phoenix/phoenixmain.asp>

The following processes are explained in this helpsheet:-

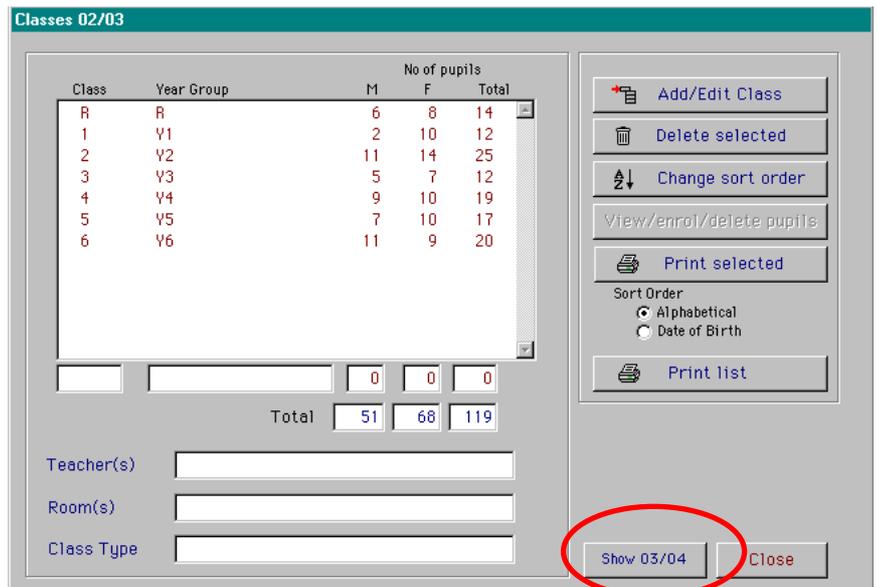
1. **Creating a Mini-Datafile for transfers to Phoenix Schools**
2. **Creating a Common Transfer File for transfers to Other Schools**
3. **Transferring the export files by Anycomms (AVCO)**
4. **Importing a mini datafile into Phoenix**
5. **Importing a CTF into Phoenix**

8. **Set up next year's registration groups (classes/forms)**

Go to **Pupil Groups > Classes**

Click **Show 03/04**

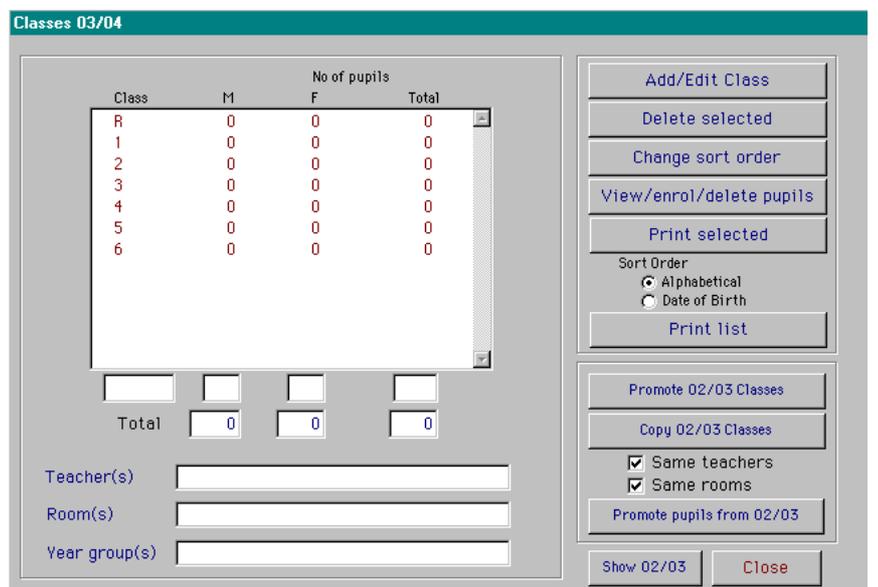
Class names can be copied from the current academic year and edited, if necessary, or they can be created afresh, one by one.



**Copy 02/03 Classes** will copy your current class structure to 03/04. Decide whether to tick **Same Teachers, Same Rooms**

After copying, Click **Add/Edit Class**, in Classes 03/04, to create new classes or edit copied class names.

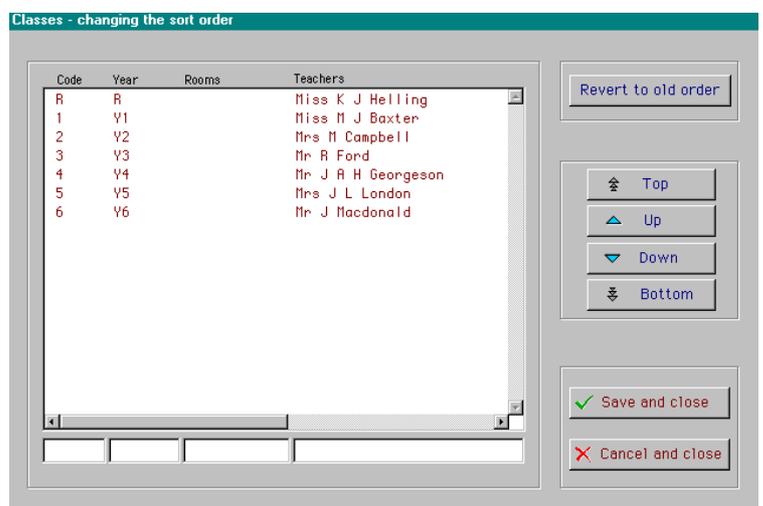
Assign teachers (ensure new members of staff have first been entered in Personnel Manager), Year Groups, Class type and room numbers



When you have set up next year's classes check that they are in the correct order. Click **Change sort order** to change the order.

Select a class and use the **Top, Up, Down** and **Bottom** buttons to change the sort order.

The order you select will determine the order forms are printed in Reports when sorted by class.



9. Enrolling pupils in classes in preparation for the Annual Update.

**Method (a), where all the pupils in a current class are moving to a new class.**

In the **Classes 03/04** screen (Pupil Groups > Classes > Show 03/04), Click **Promote pupils from 02/03**

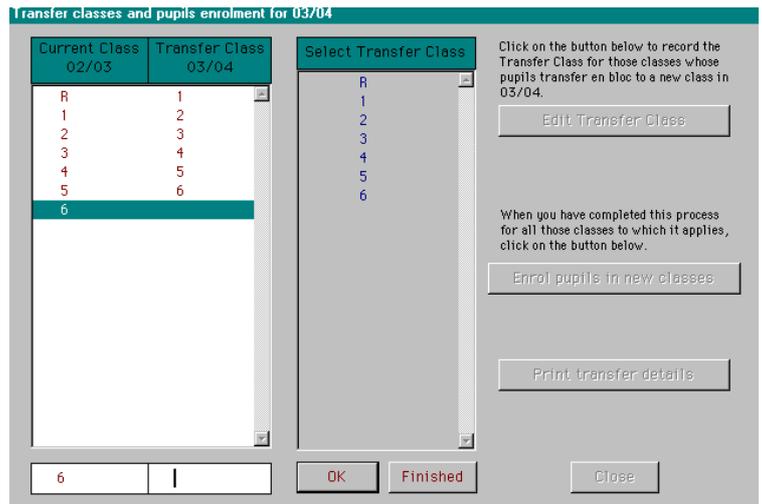
Click **Edit Transfer Class**

Select a current form in **02/03** and its transfer form for **03/04**.

Click **OK** and **Finished** when done.

Click **Enrol pupils in new classes**.

Click **Close**.



**Method (b) where only some pupils transfer to a new class. (e.g. mixed year group classes)**

In **Classes 03/04** Select a mixed year group class and click **View/Enrol/Delete pupils**.

In **Pupils in 3/4A 03/04**

Tick **only list unallocated**.

Click **Add from Year**.

Cherry pick (Use the Ctrl key) to select the pupils to be enrolled to this class.

Click **Add from Year** for each year group in the class.

Pupils already assigned a new class will not re-appear on the selection list.

Repeat for each class until all classes are fully populated.

**New Intake pupils** with a **Class on entry** will automatically be assigned to next year's classes if, after setting up next year's classes, you assign New Intake pupils a class on entry in **Quick Edit**.

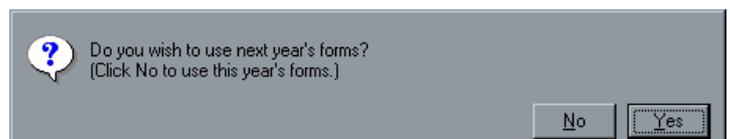
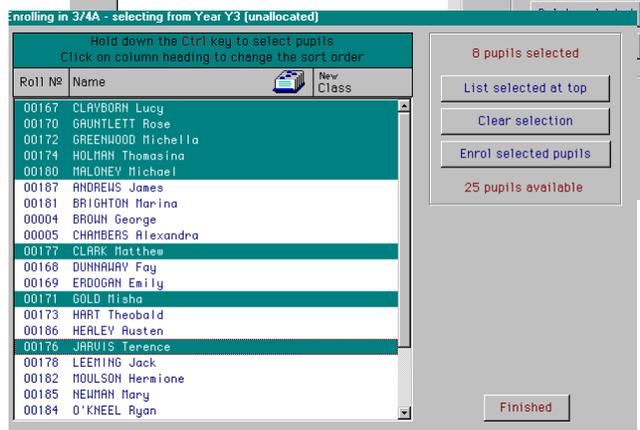
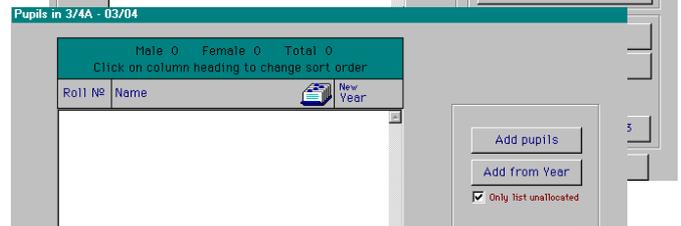
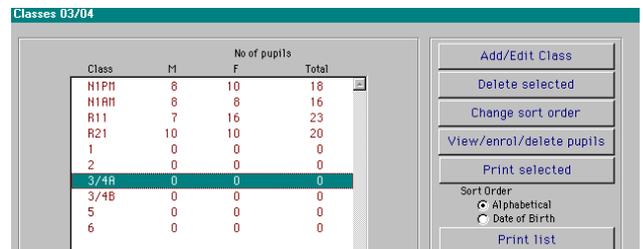
Go to **Pupil Records > Quick Edit > Classes** Select **New Intake**

Click **Yes** to the message **Do you wish to use next year's Classes?**

Select **ONLY** the September 03 Intake groups.

Once you have set up your classes you can print class lists for next year in advance. However, If you go wrong you can delete a class and start over.

**You are now ready for the Annual Update.**



**10. The Annual Update Process ~ Renaming your current datafile.**

**If you use The Phoenix Attendance Module, Wait Until The End Of Term Before Proceeding.**

A new calendar and diary is created when you change over to the next academic year. If you change over before the end of the current academic year, you will not be able to:-

enter absences, from the date you changed over, to the end of term;

print the termly absence summary, report A20, for term 3.

Once you have rolled over, most attendance reports for 02/03 will not be available.

For schools needing to access attendance reports for year 02/03 **after** the roll over, it is suggested the following procedure be adopted. Phoenix must not be running when you do this.

Before doing the Annual update, **copy** your current Phoenix datafile, **Px\_data.df1**. and **rename** the copy as **Px\_Data0203.df1**.

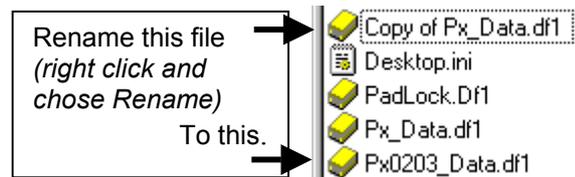
To do this, locate your Phoenix folder. This is usually located on your D drive.

**Open the Phoenix folder.**

Inside your Phoenix folder **open** your **Data folder**.

**Right click** on **Px\_Data.df1** inside the data folder and select **Copy**.

**Right click** anywhere in the data folder (but not on a filename) and select **Paste** to create a copy of Px\_data.df1.



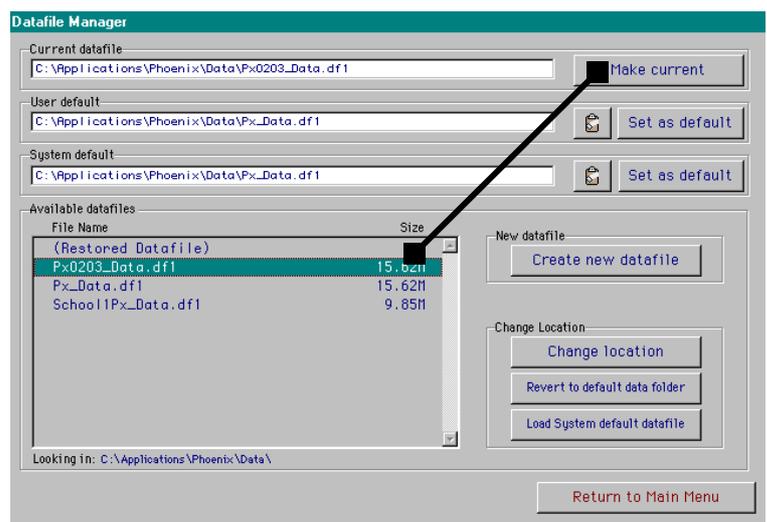
**Right click** on the **copy file** and select **Rename**.

**Rename** the copied file to **Px\_data0203.df1**.

Leave the renamed copy in the Data folder in Phoenix. The data folder will therefore contain the current live datafile Px\_data.df1 as well as the renamed copy, Px\_data0203.df1.

To access your old datafile at any time in when in Phoenix, go to the **main menu**. Click on the **File menu**. Select **Datafile manager**.

In the Datafile Manager window, highlight the file **Px\_data0203.df1**, and click **Make current**. This will open your 02/03 datafile for you only, and this session only. You will now have access to all attendance reports and statistics for 02/03.



**Do NOT** click on the **Set as Default** buttons.

Remember you are now in last year's datafile so please do NOT enter new data by mistake. When you close Phoenix and log back on, Phoenix will revert to your current live datafile.

## 11. The Annual Update Process

for Primary Sector Schools  
(Other schools, go to section 12)

Backup Phoenix before proceeding.

Logon as Admin

Go to System Manager > Annual Update.

Ensure there is a tick in **Transfer Year Groups have been set up**. If there is not:

- Check that **ALL** New Intake categories have a **Year Group on Entry** set. (Section 3)
- Check Current Year Groups have **03/04 Year Groups** set. (Section 2)

Tick **Datafile has been backed up recently**.

Tick **All pupils have new Classes**.

Tick **Clear new pupil indicators**.

Tick **Delete System log records**.

If a printout is required, go to System Management > Data Management > System Log > Find Log Entries > Print records.

Tick **Combine Leavers year Groups** if you wish to merge last years Term1,2 and 3 leaving groups into one yearly leaving group for 02/03.

Click **Select New Intake Categories**.

Highlight **ONLY** the categories containing pupils who are to be enrolled in September.

Click **Continue**.

Click **Changeover to 03/04**.

Enter a **default leaving date for new leavers**. (21/7/03)

Enter the **Default start and end dates for next year's classes**. (1/9/03 – 31/8/04).

Enter the **Start and end of term dates for the new academic year**. (1/9/03 to 19/12/03)  
(5/1/04 to 2/4/04)  
(19/4/04 to 10/7/04)

**Please Go to Section 13**

**Annual Update**

**CHECK LIST**

Before carrying out the procedures opposite in the order listed you must make sure this check list is complete.

- Datafile has been backed up recently**  
Check this box when you have made a back-up of your data, (its location is shown on the right).
- All pupils have new classes**  
Click this button to display a list of pupils who have not been assigned a new class.  
  
These will have to be allocated manually later.
- Transfer year groups have been setup**  
These must be completely setup before proceeding.

Location of current datafile  
C:\APPLICATIONS\PHOENIX\DATA\COPY OF FIRST AND JUNIOR TNG.DF1

Select options for the changeover

- Clear 'New pupil' indicators
- Delete system log records
- Combine leavers year groups

Click below to start the new year

Code	Name	Count	Admission Date
S2003	September 03 Intake	27	01 09 2003
S003N	September 03 Nursery	34	01 09 2003

Hold down the Ctrl key to select more than one line.

## 12. The Annual Update Process

## Middle and High Schools

If Using The Attendance Module, wait until the End Of Term before pressing Start New Curriculum.

Backup Phoenix before proceeding.

Logon as Admin

Go to System Manager > Annual Update.

Ensure there is a tick in **Transfer Year Groups have been set up**. If there is not:-

a. check **ALL** New Intake categories have a **Year Group on Entry** set. (Section 3)

b. Check Current Year Groups have **03/04 Year Groups** set. (Section 2)

Tick **Datafile has been backed up recently**.

Tick **All pupils have new Classes**.

Tick Clear **new pupil** indicators.

Tick Delete **System log records**.

If a printout is required, go to System Management > Data Management > System Log > Find Log Entries > Print records.

Tick Combine **Leavers year Groups** if you wish to merge last years Term1,2 and 3 leaving groups into one yearly leaving group for 02/03.

Select Specify in which Stage YGs are promoted.

Promote during Stage 1.

When selecting New Intake categories, chose only those containing pupils to be enrolled this September.

*Do not import Pupil transfer files received from feeder schools between now and the completion of Stage 2*

Click **Close**.

Click **Start New Curriculum on 20 07 03 ONLY** if your school has purchased the **Phoenix Staff absence module** as an additional package. (Not NCC supplied)

Code	Name	03/04 Year Group	Promote during Stage 1	Promote during Stage 2
SEPO34	September 03 Y4 Int	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SEPO35	September 03 Y5 Int	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SEPT04	September 04 Intake	4	<input type="checkbox"/>	<input type="checkbox"/>
7	Year 7	LU0203	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6	Year 6	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	Year 5	6	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	Year 4	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>

# STOP!

AT END OF TERM:-

Click **Start New Curriculum**.

Enter a **default leaving date for new leavers**. (21/7/03)

Enter the **Default start and end dates for next year's classes**. (1/9/03 – 31/8/04).

Click Start **new school calendar**.

Enter the **Start and end of term dates for the new academic year**. (1/9/03 to 19/12/03)  
(5/1/04 to 2/4/04)  
(19/4/04 to 10/7/04)

### 13. Additional notes following the Annual Update.

- Edit the calendar to include half term and training dates as closures or IS (training) days. Go to Attendance Data>School calendar & diary.
- The Annual Update will create new leaving categories for each term in the new academic year. If you prefer one annual leavers category, delete the termly categories and create a new yearly category. Go to Pupil Groups>Leavers' Categories.
- Check and edit if necessary, sort orders for Classes, Leavers year groups and New Intake categories. Go to Pupil Groups> Classes (or Leavers or New Intake categories) >Change sort order.
- If you have transfer pupils to import, do so now. (helpsheet available at <http://ictsolutions.norfolk.gov.uk/phoenix/phoenixmain.asp>)
- **UPN's.** Phoenix automatically assigns a temporary UPN to a new pupil record. A temporary UPN will always end in a letter (e.g. C93623440002A ). Pupils manually entered in New Intake, for example Nursery or Reception children who had no previous UPN, will now need to have their temporary UPN's changed to permanent UPN's. Permanent UPN's are created after the Roll Over in order that they contain the correct year of entry (03) (e.g. Q936234400003).

The easiest way to assign permanent UPN's is in Quick Edit.

From the Phoenix Main Menu, go to **Pupil records > Quick Edit > UPN**. Select **Current Pupils**. Right click on the button **Actions** and select **All temporary UPN's**.

You should have no Current Pupils (other than Reception Children) with temporary UPN's. If you have, you may need to contact the feeder school of any pupil with a temporary UPN. The feeder school should assign the pupil a permanent UPN, and then notify you of this number.

If you have any problems, contact the Management Information Centre on 01603 222352

- Archive leaving Staff and assign new staff.
- At this point, if everything is to your satisfaction, please backup Phoenix.
- Finally, Go to **System Management>Data Management>Data Validation** and tick the following boxes:-

In **Recalculate totals**, select *Year Groups & Categories* and *Classes*.

In **Validate Parent & Pupil Data**, select *Class sort orders* and *Year sort orders*.

Scroll down and select *Check for duplicate roll numbers*.

**Then click Validate Data.**

**This** will ensure class totals are accurate following the update.

**The helpline number is 0845 3033003.**

**The ICT Web site is <http://ictsolutions.norfolk.gov.uk>**

**We are always pleased to take a call from you.**