



How to Create the New Academic Year

Applicable to SIMS Version

7.132 onwards.

Permissions Required

You will need to be a member of any of the following user groups in System Manager to create a new academic year:

School Administrator, System Manager, Timetabler.

Please see your System Administrator/Manager if you are not sure whether you have the required permissions.

Introduction

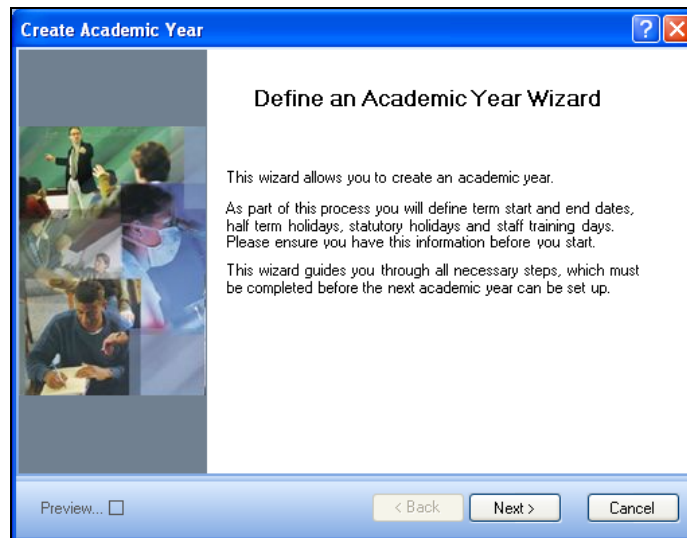
This help sheet describes how to create a new academic year, including the definition of the start and end dates for each of the school terms and half-term holidays, together with dates for public holidays and staff training days. If SIMS Attendance is in use, appropriate attendance records will be created for each pupil/student on the dates entered.

IMPORTANT NOTES:

- *Due to the amount of processing resource required to create an academic year, whilst not essential, it is **strongly** recommended that all other users log out of SIMS before commencing this process. Continuing to work whilst an academic year is being created is likely to result in error messages.*
 - *Please be aware that the process may take a long time because the system creates attendance records for the new academic year.*
 - *When creating an academic year, the start date of the first term is deemed to be the first day of the academic year. This may not necessarily be the day that pupil/students arrive in school; it could be an INSET day for example. An end date is calculated for 365 days later. For example, if the academic year starts on 02/09/10 then an end date of 01/09/11 is automatically supplied.*
 - *The first day of term should be specified even if pupil/students are not in attendance.*
 - *Any dates within the start and end dates of the academic year that are not term dates or training days, are considered to be holidays. This prevents the need to manually enter holidays (apart from half-terms and bank holidays).*
 - *Promotion into new year groups, etc. occurs automatically on the first day of the first term of the new academic year (providing that the promotion process has been carried out).*
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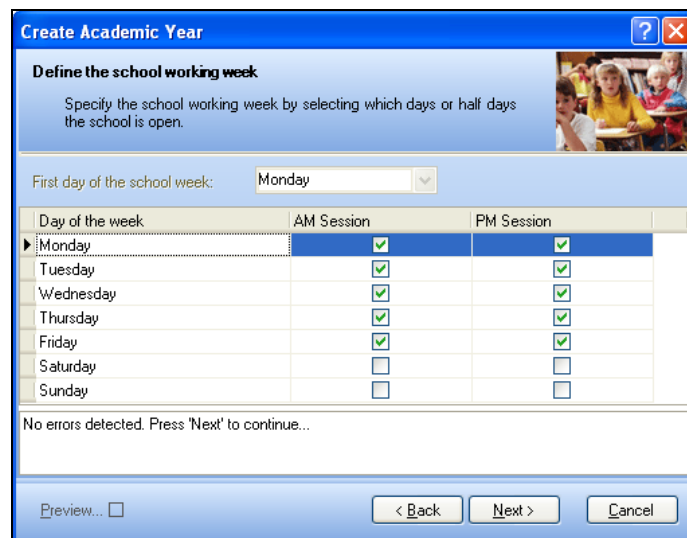
Promotion into new year and registration groups, etc. occurs automatically on the first day of term in the new academic year, providing that the promotion process has been carried out. Please see our End of Year procedures which can be found on our SupportNet web site (<http://support.capitaes.co.uk>) by entering **EOY** in the **Site Search** field.

1. Select **Routines | School | Academic Year** to display the **Define an Academic Year Wizard**.



2. Click the **Next** button to display the **Define the school working week** page.

Defining the School Working Week



The **First day of the school week** drop-down list is read-only and displays the first day of your school week as specified when your system was first set up.

1. Define the days when the school will be open by selecting the relevant check box(es) adjacent to each day including both **AM** and **PM Sessions** as required. **AM Session** and **PM Session** check boxes are selected by default for Monday through to Friday.

NOTE: Boarding schools should select all fourteen sessions to record weekend registration.

2. Click the **Next** button to display the **Define the terms and term holidays for the academic year** page.

Defining School Terms

When entering term dates, the start date should always be the date the term starts, even if s are not in school on those days.

The screenshot shows the 'Create Academic Year' wizard with the following callout boxes:

- Click in the Term Start Date field and enter the date in dd/mm/yyyy format.** (Points to the 'Term Start Date' column in the table)
- Click in the Term End Date field and enter the date in dd/mm/yyyy format.** (Points to the 'Term End Date' column in the table)
- Overtyping the term name if a different name is required.** (Points to the 'School Term' column in the table)
- The holiday that follows the term is displayed by default. Select a different holiday from the Term Holiday drop-down list, if required.** (Points to the 'Term Holiday' column in the table)
- Click this button to add any additional terms, e.g. if your school has a 6 term academic year.** (Points to the 'Add Term...' button)
- A summary of any outstanding errors is displayed here.** (Points to the 'No errors detected. Press 'Next' to continue...' message)

- Enter the dates for the Autumn, Spring and Summer terms by clicking in the applicable **Term Start Date** and **Term End Date** fields and entering the dates in dd/mm/yyyy format.

NOTE: Schools who have more than three terms in their academic year will need to add additional terms as described in Adding Additional School Terms on page 4.

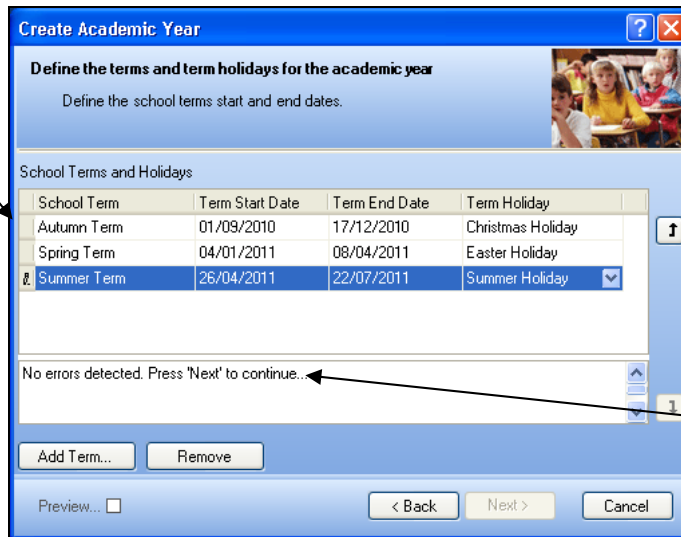
Alternatively, click in the date cell until a down arrow appears, then click the arrow to display a calendar from which the required date can be selected.

The screenshot shows the 'Create Academic Year' wizard with a calendar displayed over the 'Spring Term' row. The calendar shows the month of September 2010. The 'Term Start Date' is 01/09/2010 and the 'Term End Date' is 17/12/2010. The 'Term Holiday' is Christmas Holiday. The calendar has 'Today' and 'Clear' buttons.

*NOTE: You can overtype the name of the term in the **School Term** column if a different name is preferred.*

- Each term has a default holiday displayed in the **Term Holiday** column. If required, select a different holiday from the drop-down list or manually type a new holiday name.
- Repeat this process for all the default terms displayed, selecting the applicable holiday for each term. Any errors are displayed in the lower section of the wizard and must be resolved before you can proceed.

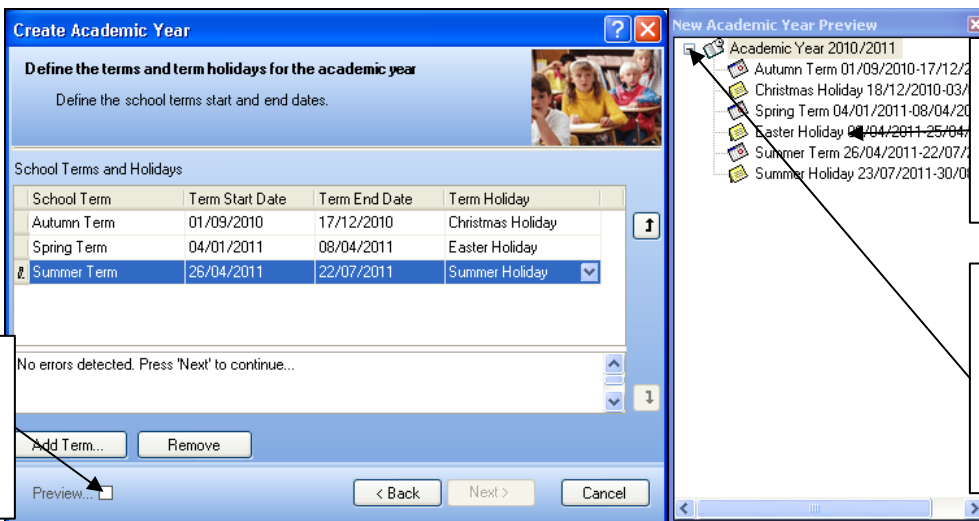
This example shows a typical three term academic year has been specified.



The lower section of this wizard shows that there are no errors.

6. If you are happy with the default three school terms, click the **Next** button to display the **Define the half-term holidays** page and go to *Defining Half Term Holidays* on page 5.

NOTE: If the **Next** button appears greyed out, move the cursor off the last **Term End Date** by pressing the **Tab** key.



Selecting this check box displays a preview of the information entered so far.

The preview is displayed here. This example shows a preview of a completed academic year.

Expand the preview for more detail by clicking the + icon (which changes to a - icon when selected). The detail is displayed directly below.

At this point onwards, you can select the **Preview** check box on the wizard to display a preview panel on the right-hand side of the wizard. The preview panel will update based on the selections you make throughout the Wizard. Deselect the **Preview** check box whenever you want to hide the preview panel.

Adding Additional School Terms

Some schools may wish to add additional terms, if for example your school has four or six terms in an academic year. The following example shows the addition of a Winter term.

NOTE: When adding terms, the start date should always be the date the term starts, even if pupil/students are not in school on that day.

1. From the **Define the terms and term holidays for the academic year** page of the wizard, click the **Add Term** button to display the **Term Details** dialog.

2. Select the term name from the **School Term** drop-down list. If the required name does not exist, enter a name manually e.g. **Winter Term**.
3. Enter the **Term Start Date** and **Term End Date** for the term in dd/mm/yyyy format. Alternatively, click the **Calendar** button and select the required dates from the calendar.

 *Calendar button*

4. Select the holiday that will follow the term from the **Term Holiday** drop-down list, e.g. **Christmas Holiday**. If the required name does not exist, enter the holiday name manually.
5. Click the **OK** button to add the term. Repeat for any other additional terms that may be required.
6. Click the **Next** button to display the **Define the half term holidays** page.

Defining Half-Term Holidays

Holidays are automatically created for the dates in between the term dates entered. For example, if the Spring term ends on 01/04/2011 and the Summer term starts on the 19/04/2011, then it is assumed that the dates in between are holidays. In addition, you need to enter the dates for half-term holidays manually.

NOTE: You do not need to define half term holidays if you have created a six term academic year where the half-term dates fall between the terms.

Category	Start Date	End Date	Description

1. From the **Define the half-term holidays** page, click the **Add Holiday** button to display the **Half Term Holiday Details** dialog.

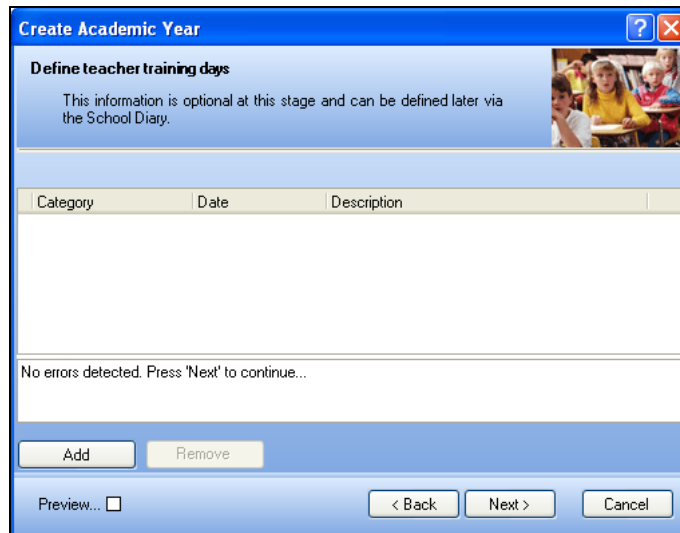
2. Select **Half-Term** from the **Category** drop-down list.
3. Enter the **Start Date** and **End Date** for the half term holiday in dd/mm/yyyy format. Alternatively, click the **Calendar** button and select the required dates from the calendar.
4. Enter a **Description** for the half term holiday if required, such as **Autumn Half-Term**. This description appears in the School Diary.
5. Click the **OK** button to add the half-term holiday.
6. Repeat steps 1 to 5 for both the Spring and Summer half-term holidays.

Category	Start Date	End Date	Description
Half-Term	25/10/2010	29/10/2010	Autumn Half Term
Half-Term	14/02/2011	18/02/2011	Spring Half Term
▶ Half-Term	23/05/2011	27/05/2011	Summer Half Term

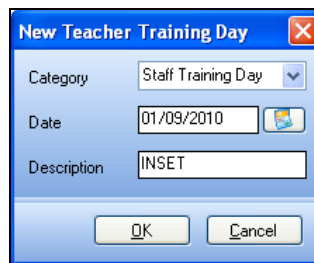
7. Click the **Next** button to display the **Define teacher training days** page.

Defining Teacher Training Days

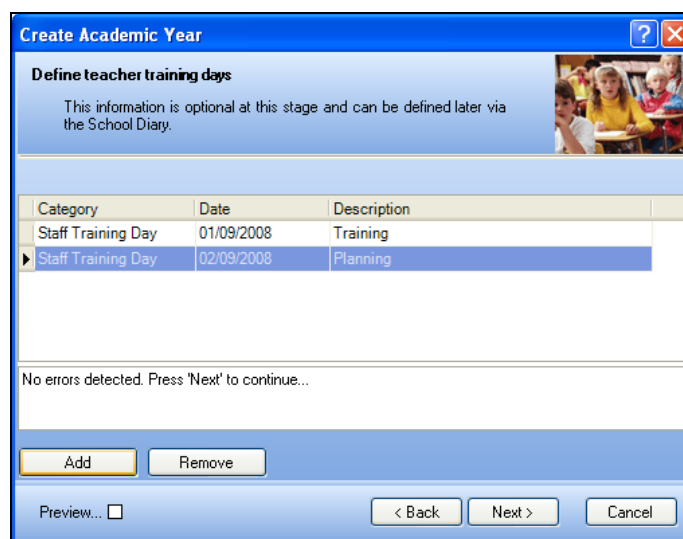
The **Define teacher training days** page is used to enter any training days where s will not be attending school. It is advisable to enter any known INSET days at this point. Alternatively, they can be added later via the School Diary (**Focus | School | School Diary**).



1. From the **Define teacher training days** page, click the **Add** button to display the **New Teacher Training Day** dialog.



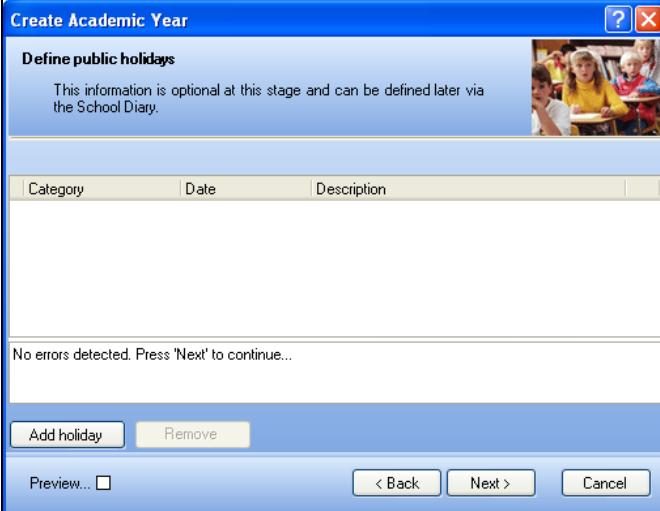
2. Select **Staff Training Day** from the **Category** drop-down. If the required category name does not exist, enter the name manually.
3. Enter the **Date** of the training day in dd/mm/yyyy format or click the **Calendar** button and select the date.
4. Enter a relevant **Description** if required, such as **INSET Day** to ensure that the type of training can be identified. The description will appear in the School Diary.
5. Click the **OK** button to add the teacher training day. Repeat for any other required teacher training days.



6. Click the **Next** button to display the **Define public holidays** page.

Defining Public Holidays

In addition to other dates during term time, you will also need to specify any public holidays such as Bank Holidays, particularly those that occur during a term.



Create Academic Year

Define public holidays

This information is optional at this stage and can be defined later via the School Diary.

Category	Date	Description
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No errors detected. Press 'Next' to continue...

Preview...

1. From the **Define public holidays** page, click the **Add Holiday** button to display the **New Public Holiday** dialog.



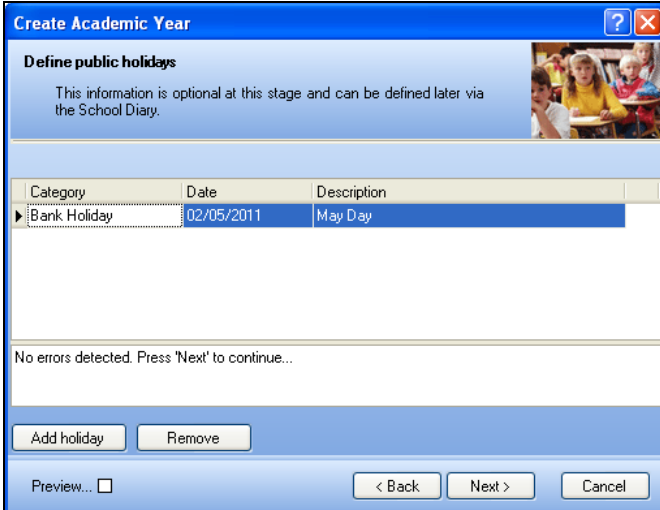
New Public Holiday

Category: Bank Holiday

Date: 02/05/2011

Description: May Day

2. Select **Bank Holiday** from the **Category** drop-down list. If the category name does not exist, enter the name manually.
3. Enter the **Date** of the public holiday in dd/mm/yyyy format or click the **Calendar** button and select the required date.
4. Enter a relevant **Description** such as **May Day**. The description appears in the School Diary.
5. Click the **OK** button to add the public holiday. Repeat this process for all public holidays throughout the academic year.



Create Academic Year

Define public holidays

This information is optional at this stage and can be defined later via the School Diary.

Category	Date	Description
Bank Holiday	02/05/2011	May Day

No errors detected. Press 'Next' to continue...

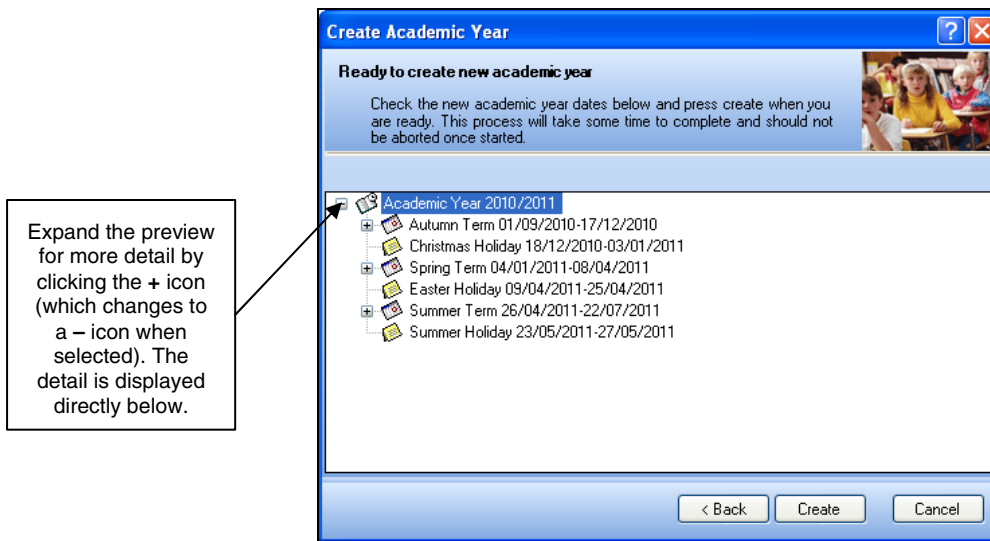
Preview...

6. Click the **Next** button to display the **Ready to create new academic year** page.

Creating the New Academic Year

Whilst it is not essential, it is strongly recommended that all other users log out of SIMS before commencing this process. This is because a large amount of processing resource is required to create an academic year.

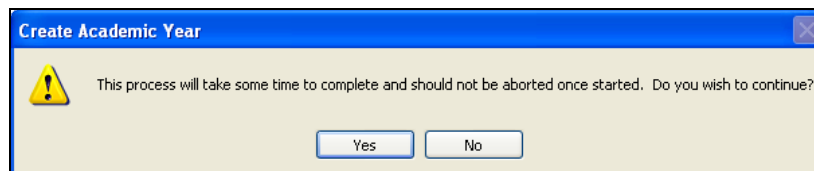
Please be aware that this process may take a long time because the system creates attendance records for the new year.



1. A summary of the data entered is displayed in the **Ready to create new academic year** page. The detail for each term can be expanded to display its public holidays, teacher training days etc. by clicking the applicable + icon. Check this information carefully for any errors or inaccuracies.

Once you are sure the information is correct, click the **Create** button to create the new academic year. If there are any anomalies in your settings, you are asked to confirm whether you wish to proceed or review your settings. If you are certain the data is correct, you can proceed.

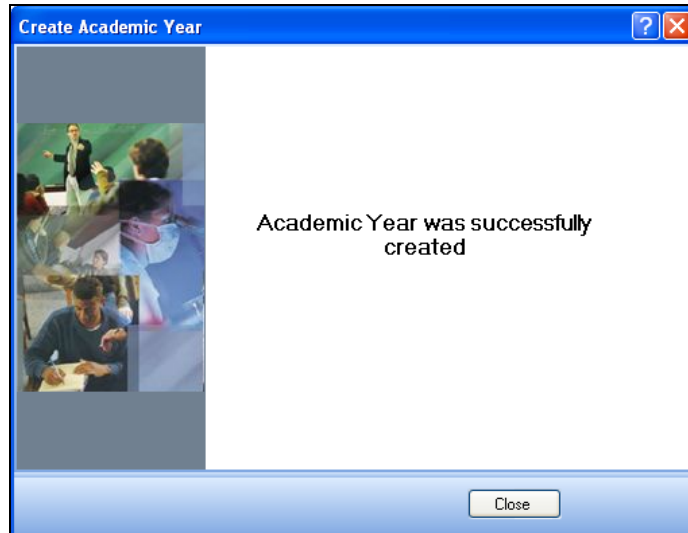
The following warning message dialog is displayed:



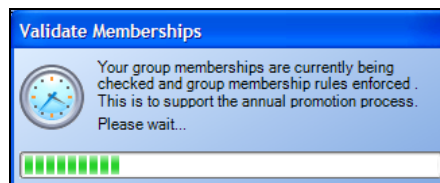
Progress is displayed via a progress indicator at the bottom of the wizard.



Once complete, the final page of the wizard is displayed:



2. Click the **Close** button to close the wizard and complete the process.
3. It is recommended that once you have created an academic year, you validate your group memberships by selecting **Tools | Validate Memberships**, which displays the following page.



For more information, please refer to:

- *Defining the Pastoral Structure* chapter in the *Setting Up and Administering SIMS* handbook.
- *End of Year Procedures* (enter **EOY** in the **Site Search** field on the SupportNet home page).

All handbooks can be accessed from the **Documentation Centre** which is launched by clicking the **Documentation** button on the **Home Page** in SIMS. Once open, click the **Handbooks** button and select the required handbook from the **Handbooks** page.

Training Courses

For information on training courses, please contact your SIMS Support Provider.

Providing Feedback on this Help Sheet

If you have any suggestions or comments about this or any of our other help sheets, please email helpsheets@capita.co.uk.

Help Sheet Revision History

Doc. Version	Change Description	Date
1058-001	Initial Release	28/02/06
1058-002	Added a note on checking current pastoral structure before proceeding. Updated to reflect new look from SIMS July Update and to include graphics and dates for 2007/08 academic year.	19/03/07
1058-003	Updated to include graphics and dates for the 2008/9 academic year.	15/05/08
1058-004	Updated cross references with new documentation location.	06/11/08
1058-005	Updated graphics and text for the 2010/2011 academic year.	08/06/10