

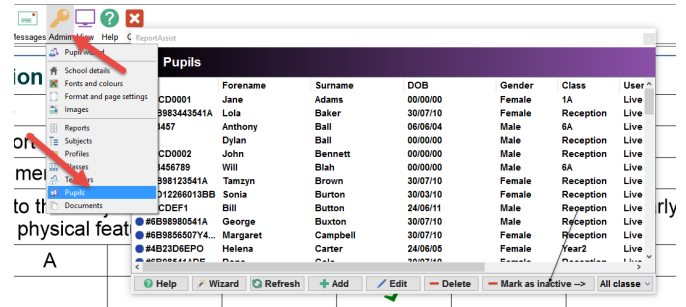
Starting a New Year...

It is important that you follow these steps in the correct order, please do not skip a step.

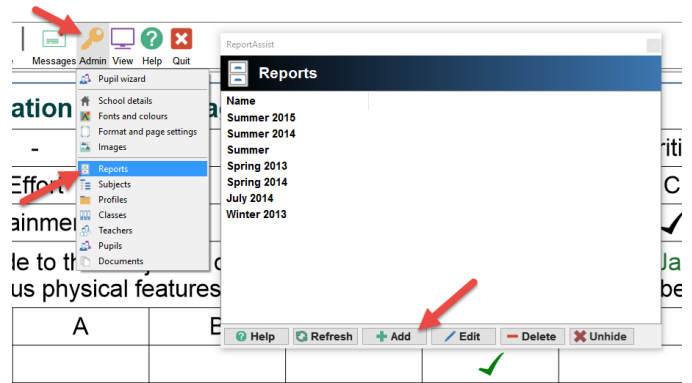
Before we start, please make sure your teacher and class details are correct (there may have been changes)

There is a step by step guide to doing this in our website Resources section "Adding Editing and Removing Teachers"

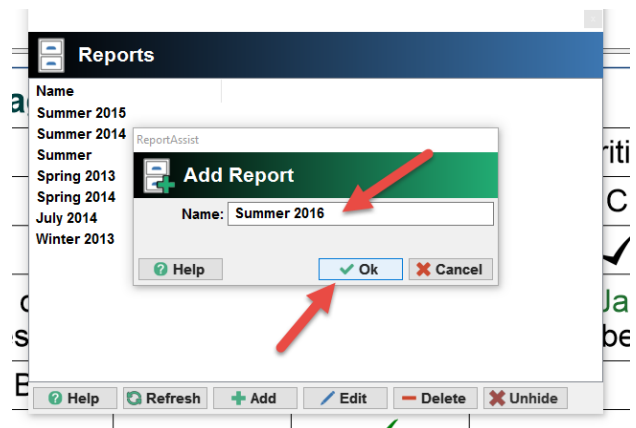
1. Make the current school year 'inactive' by clicking Admin>Pupils and then 'Mark as inactive'.



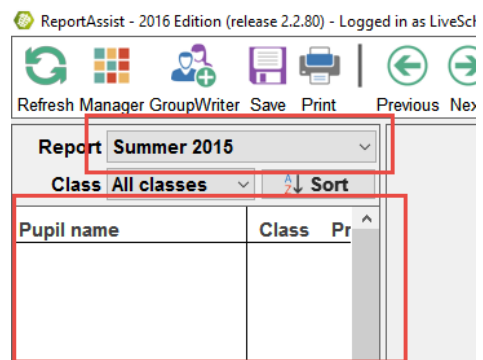
2. Make a new report by clicking Admin>Reports and then 'Add'.



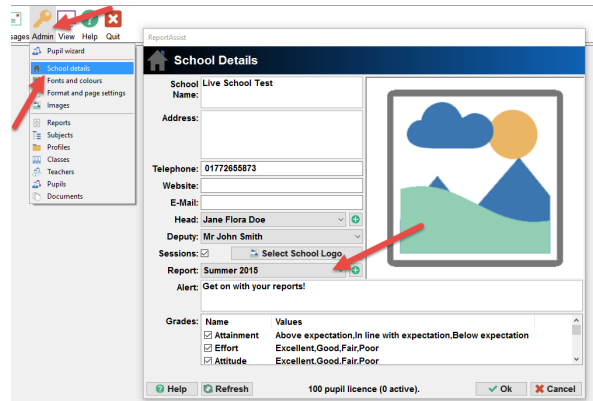
3. Name the new report, eg Summer 2016, July 2016, 2015/2016, as you prefer then 'Ok' this.



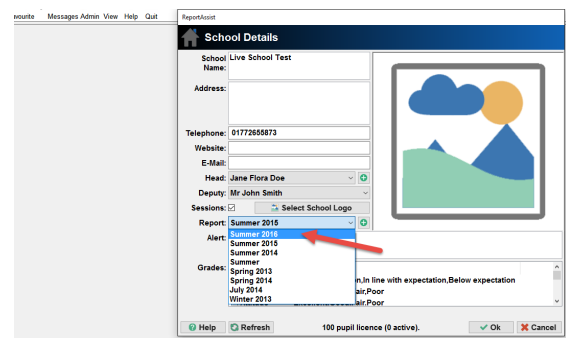
4. The report will still be set to your last report season and the pupil list will be empty.



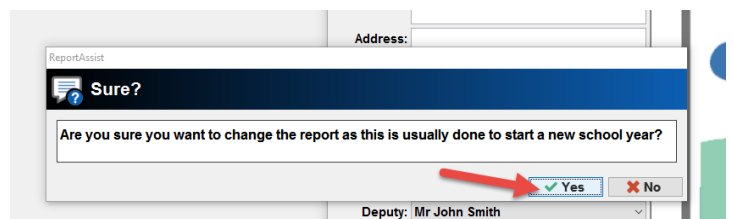
5. Click Admin>School Details and notice that the default report is still the current report.



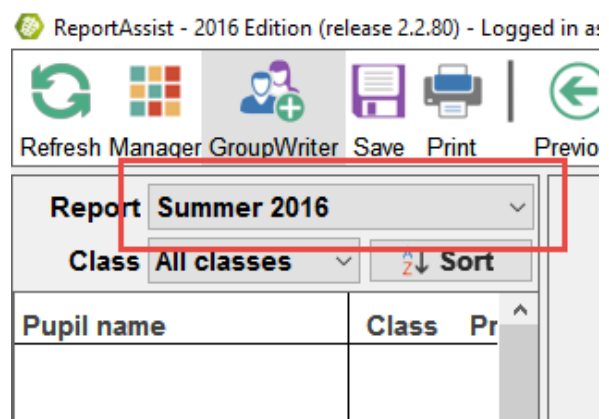
6. Click the dropdown and select the new title you created in step 2.



7. You will be asked if you are sure you want to change the report, click 'Yes'



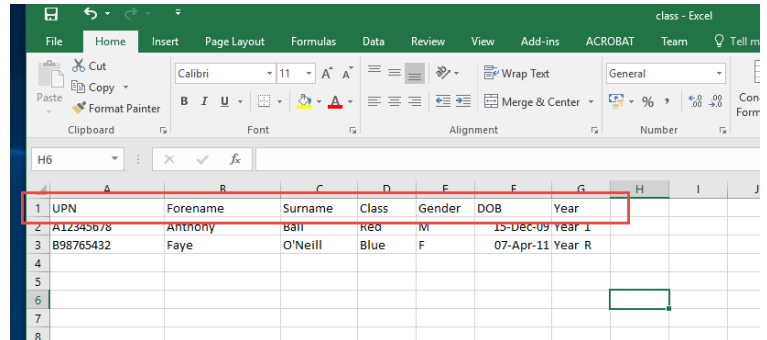
8. Notice that the report is now set to the new report in the main part of the program.



9. Now we need the latest pupil list...

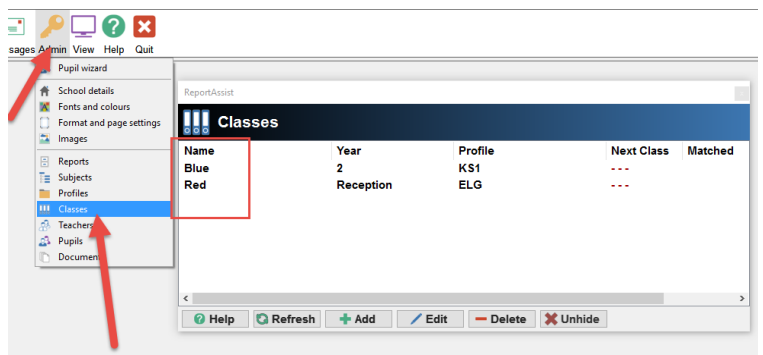
Create (or ask someone to create) a CSV for your current pupils on roll, it should have the headings 'UPN, Forename, Surname, Class and Gender' (you can also then add DOB and Year columns if you wish).

Important: You should double check that line 1 of the CSV file has the column titles and that the data looks correct before you import it into the program by loading it into Excel for example.

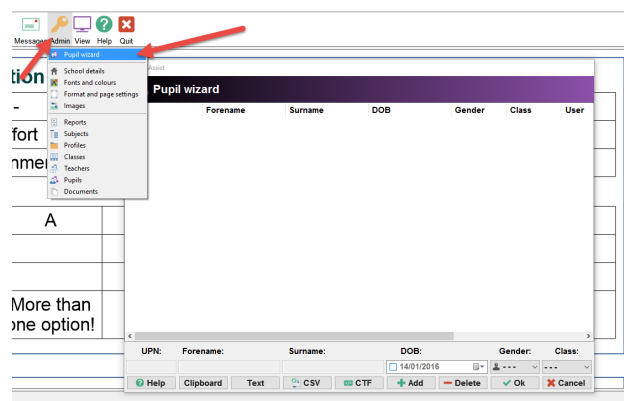


There is a step by step guide to doing this in our website Resources section "How to create a CSV"

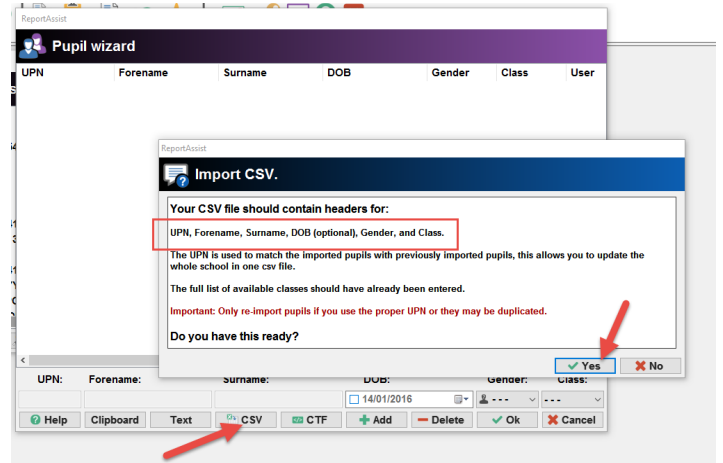
10. Double check that the class information in the program matches the names in the Class column of the CSV file, if a class is missing or has changed name then you need to add or edit this.



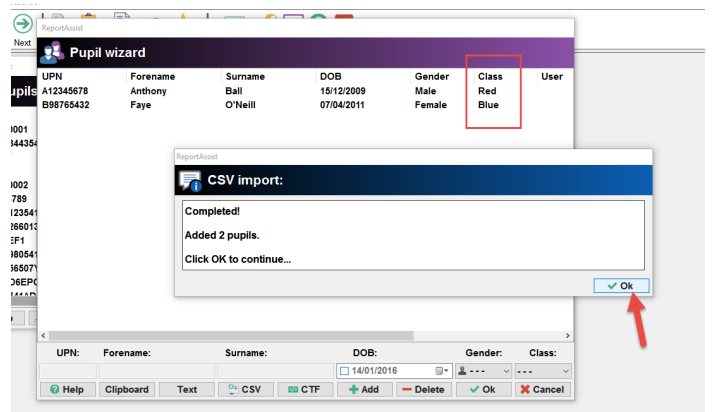
11. Now start the import wizard by clicking Admin>Pupil wizard.



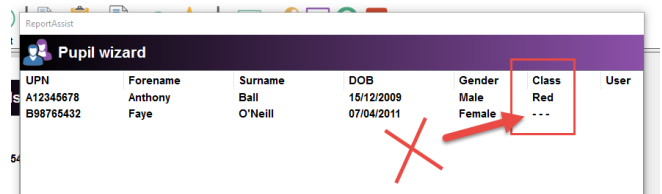
12. Click CSV (or CTF if you use a CTF file, the process is similar). You will see some instructions as to what the file should contain. Click 'Yes'.



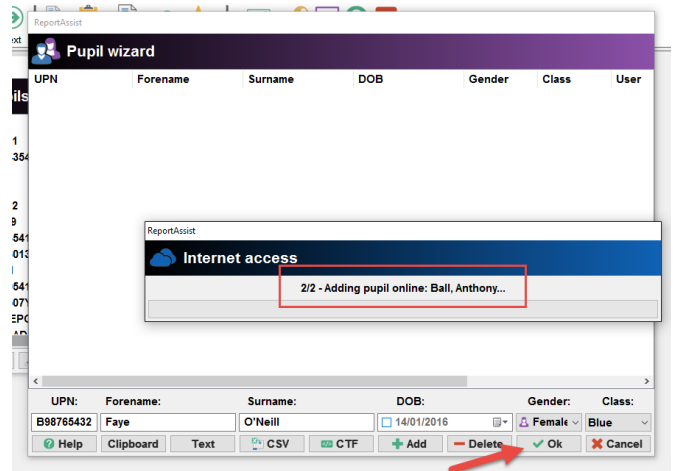
13. A file selector will appear, once you have picked your CSV file the program will display how many pupils were imported. Notice that the class information is displayed.



14. Check that the class information is correct. If you see '- - -' then the class for that pupil was not found in the list of classes (see step 10) you should cancel the import and either add/edit the class in the program or in the CSV file. Then try again from step 11.

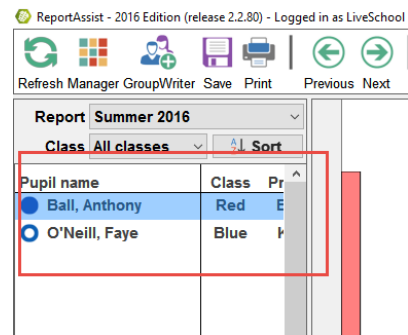


15. Click 'ok' to start the import process, it will add or update each pupil until all the pupils have been imported (this can take some time depending on how many pupils you are importing).



16. After importing notice that the pupil list now has the new set of pupils.

You are now ready to start writing your reports!



17. To see past sets of reports just use the drop down menu above the pupil list.

