



Roll Over Checklist

Work through each step when the year rolls over in September. Click the  icons for more information!

Step 1 / Create new year (Admin > Settings > School/Academic Year > 'Create School/Academic Year')

- Select the latest year from the School Year dropdown (if it doesn't appear automatically).
- Enter start and end dates for the new school year, then click 'Create'.
- Enable the new year by clicking '**Make Default**'. **Note: It may be beneficial to keep the previous school year as the 'default' until all reviews have been carried out for last year's records.**

Step 2 / Add report windows (Click on your new year > 'Add Report Window')

- Add report windows for your specific periods within the school/academic year (e.g. terms or half-terms), allowing for additional filtering of the records/reports and comparisons in trends.
- If you would like to create additional/new report windows, click the Report Window List tab then 'Create Report Window'.

Step 3 / Structure update (Admin > Data > Structure)

- ***Optional** Update class contexts and the Class Context Profile. Run your new file through the SISRA Observe Excel Add-In, save as a CSV (MS-DOS) file and import into the Class Import tab, to ensure classes are up to date.
- Add, move and deactivate any departments or teams (where necessary) in the Structure List tab using the options underneath Actions.

Step 4 / Staff update (Admin > Data > Staff)

- ***Optional** Update staff filters and the Staff Filter Profile. Run your new staff data file through the SISRA Observe Excel Add-In and save as a CSV (MS-DOS) file.
- Re-import your staff data file into the Staff Import tab, to ensure up-to-date staff information. Alternatively, manually add small numbers of new staff in the Staff List tab by clicking 'Create Staff Member'.
- Update staff statuses as 'Left School' or 'Excluded' if staff have left, in the Staff List tab by clicking on their name then 'Edit Details'.

Step 5 / Create Users and update user permissions (Admin > Users > User > User List tab)

- Create new User accounts for new staff members by clicking 'Create User'. You will need to link the user to the relevant existing Staff Member (they should have been added in your recent staff data import, covered in Step 4).
- Manually check and amend your users and their permission levels by clicking on their name then 'Edit' underneath User Details or User Permissions. Note - An export of staff permissions can be downloaded from Admin > Exports > 'Export Staff Permissions', if required (to quickly check individual user's permissions are up to date).
- Block any users that no longer require access by placing a tick in the tick box, then 'Block Selected'.

Thanks for reading. Feel free to pop onto Live Chat by clicking 'Support' in Observe if you have any questions.