Synergetic User Guide

Next year process

Version 68

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Synergetic User Manual Chapters

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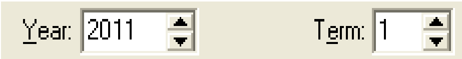
Next year process

When Synergetic was first installed and set up in your organisation, you chose to use either semesters or terms as your default reporting period. In this section, the words semester, term and reporting period are used interchangeably.

Throughout Synergetic, there is a default file year and term that relevant transactions apply to.



Before the start of each new term or semester, you have to create the new term's details within Synergetic. The reason for this is that a lot of the information held about a student is specific to the reporting period. For example, each student's year level, form, house, tutor group, boarder, status, classes, assessment results and timetabling information is all specific to a reporting period.

Important note: You may need to change your default year and semester to process billing and run reports accurately.

How to:

- Prepare for the new academic year, create the first semester of the new academic year, and process current and future students. See *Creating new academic years* (on page 2).
- Create next year's general ledger. See *Creating the next general ledger year* (on page 137).

Creating new academic years

There are a number of reasons why you create a new academic year:

- Preparing for the next academic year, as part of the normal annual process.
- Importing the timetable, classes and assessments for the next reporting period for the new year. You can only import them into Synergetic when you have the new reporting period created and set up.
- Charging future students for books or fees before the start of the new year. You can only run charges in Synergetic when you have the new reporting period created and set up.
- Running next year's billing early.
- Allocating students to forms, houses and tutor groups.

It is recommended that you run this process as late as possible in the current academic year, so that you can include:

- any late changes to the status of students
- changes to co-curricular involvements that can occur late in the year.

Creating a new academic year

To prepare and create a new academic year:

1. Check the status of current students. See *Updating the status of current students* (on page 4).
2. Update the application of any future students who cancel next year's enrolment. See *Updating a cancelling future student's application* (on page 37).
3. Update the application of any future students who defer their enrolment to a later year. See *Updating a deferring future student's application* (on page 39).
4. Transfer future students who will be starting at your organisation **before** the new year to current students. See *Transferring future students to current students* (on page 36).

   Note: This creates a term 4 student, instead of a new student as at the start of the next year.
5. Check the **luYearLevel** lookup table to ensure that all the rules are correct. See *luYearLevel lookup table* (on page 60).
6. Review the **File Semester** and **Next Semester Creation Rules** in **Student File Semester Maintenance** to ensure they are correct. See *Maintaining student file semesters* (on page 67).
7. Finalise the current term. See *Finalising terms* (on page 80).
8. Create the next term's or semester's details. In this case, the first in the next academic year. See *Creating next term details* (on page 83).
9. Transfer all confirmed and finalised future students into next year's current student file. See *Transferring future students to current students* (on page 36).

   Note: These are all students who will be starting at your organisation during the next academic year, based on the date used by the registrars for new students for next year.
10. Run the **Debtor Bulk Additions** program to create debtor records for all the new students and to update the records of existing students. This allows you to bill them for fees and other expenses. See *Adding debtors in bulk* (on page 87).
11. Handle student exceptions that may arise **after** the new year has been created. See *Handling exceptions after the next year has been created* (on page 88).

Activities that can be performed after the new academic year is created

Once the new academic year is created, you can:

- Transfer current students who have left to past students. See *Transferring current students to past students* (on page 111).
- Delete and roll future students who have been transferred, or who were marked for the year just started, but not finalised.
- Add enrolments for the new year at your organisation.
- Prepare year level lists.
- Allocate students to forms, houses and tutor groups. See *Current Student Maintenance - School tab - Status sub-tab* (on page 7).
- Prepare form lists and/or tutor group lists.
- Update the fee table and concessions and prepare a tuition test run.
- Export student details to the timetable package (if allowed by the timetable package used).
- Import student classes and timetable details from the timetable package back into Synergetic (if allowed by the timetable package used).
- Prepare class lists and timetables for next year (subject to data imported or entered in to Synergetic).
- Charge future students for school books before the new year. You can only run charges in Synergetic when you have the new reporting period created and set up. See *Entering debtor charges* (on page 119).

Before the start of the new academic year

Before or at the start of a new academic year:

1. Set the system default for the year and semester or term using the **Set as Current Year and Term** field on the **Create Next Term Details** window. See *Creating next term details* (on page 83).
2. Transfer current students who are leaving to past students. See *Transferring current students to past students* (on page 111).

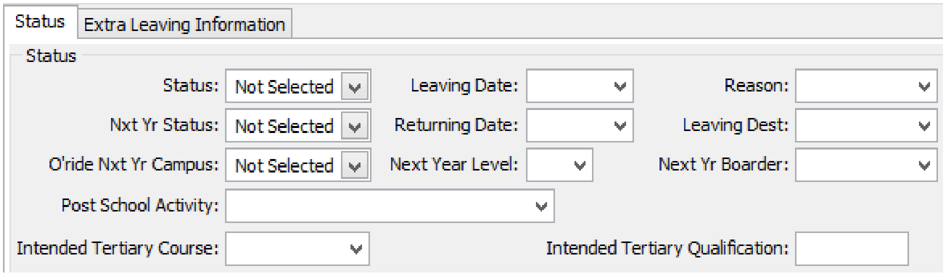
   Note: You usually leave this until January or a little later, because in December you may still need to mail to year 12 students as current students, not past students.

   Note: Do not transfer year 12 students that are repeating the year. If you have already set the **Next Year Status** of repeating students to **Repeat** they will not be transferred.

Updating the status of current students

Check the status of current students to make sure they are all up to date before creating the new academic year. See *Current Student Maintenance - School tab - Status sub-tab* (on page 7) in the Current students or Next year process manual.

Note: You do not need to update the status of year 12 students unless they are repeating.



Status and Nxt Yr Status fields

The following table describes how the **Status** and **Nxt Yr Status** fields affect the processing of the student's record when creating a new academic year.

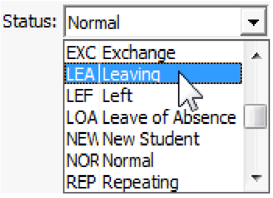
Status:	**Synergetic:**
Left Leaving	will **not** transfer the student.
Nxt Yr Status:	**Synergetic:**
Leaving	**will** transfer the student.
Not selected Normal	**will** copy the student's **Next Year Status** to the new year.
Left	will **not** transfer the student.
Repeating	will **not** roll the student up a year level.

Also, the **Nxt Yr Status** field will **override** the **Status** field. For example, if the **Status = Leaving** and **Nxt Yr Status = Normal**, the student is transferred and their status set to **Normal** in the new academic year.

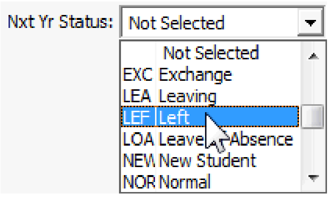
Leaving students

If a student is leaving:

1. Select **Leaving** from the **Status** drop-down list.



2. Enter the **Leaving Date**. For example 31st December.
3. Select **Left** from the **Nxt Yr Status** drop-down list.



4. Update any other fields required at your organisation. For example, at New Zealand schools the following fields are required:
   - **Reason**. See *Reason for leaving* in the Roll returns manual.
   - **Post School Activity**. See *Post school activity* in the Roll returns manual.

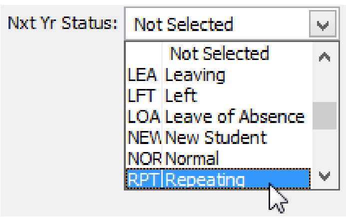
Tip: You can tag students that are leaving then set the field values in bulk. See *Setting field values in bulk* (on page 30) in the Introduction or Next year process manual.

5. If you are New Zealand school, update fields on the **Extra Leaving Information** sub-tab. See *Current Student Maintenance - School tab - Extra Leaving Information sub-tab* (on page 16).

If you are notified of a student leaving after you have created the new academic year, see *Processing a student leaving after the new year has been created* (on page 89).

Repeating students

If a student is repeating, select **Repeating** from the **Nxt Yr Status** drop-down list.



Tip: You can tag students that are repeating then set the field values in bulk. See *Setting field values in bulk* (on page 30) in the Introduction or Next year process manual.

If you are notified of a student repeating after you have created the new academic year, see *Processing a repeating student after the new year has been created* (on page 97).

New students

Students enrolling during the year would normally be created in Synergetic when they enrol. See *Creating new students* (on page 23) in the Current students manual.

If a student enrols after you have created the new academic year, see *Adding a new student in the current year after the new year has been created* (on page 100).

Current Student Maintenance - School tab - Status sub-tab

Use the **Status** sub-tab to:

- maintain key schooling information including campus, form and year
- allocate students to forms, houses and tutor groups after the academic year is created
- maintain a summary of out of hours school care
- maintain current and next year status, including dates when leaving and possibly returning.

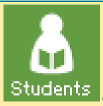
Note: New Zealand schools also use the **Extra Leaving Information** sub-tab. See *Current Student Maintenance - School tab - Extra Leaving Information sub-tab* (on page 16).

Opening the Status sub-tab

To open the **Status** sub-tab:

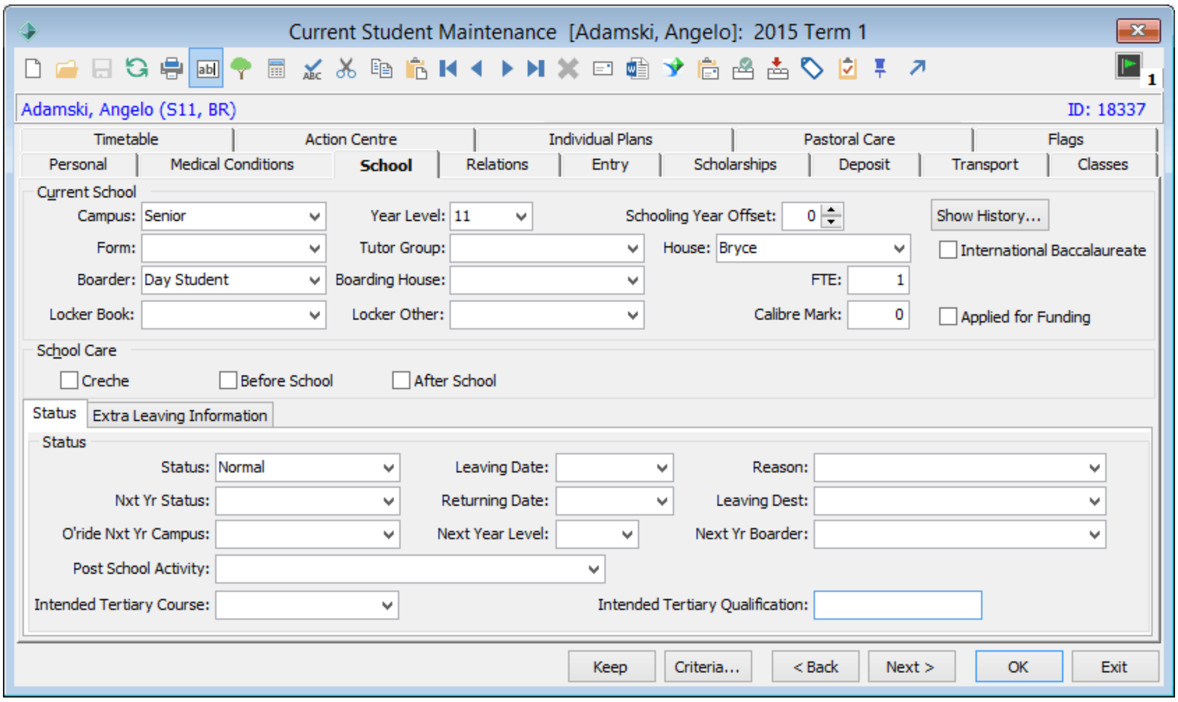
1. Select **Module > Students > Current Student Maintenance** from the main menu.

   The **Set Current Student Search Criteria** window is displayed.

   > **Tip:** You can also access the current student functions by clicking .
   >

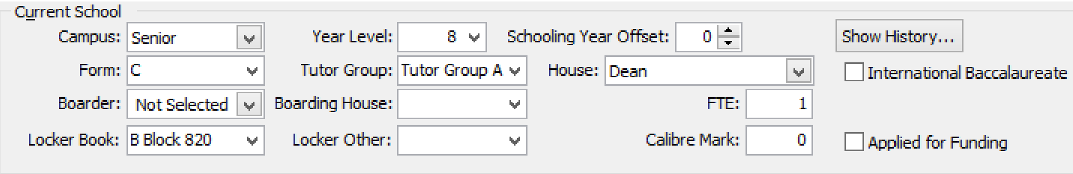
2. Search for the student. See *Searching for existing students* in the Current students manual.
3. Click the **School** tab.

   The **Status** sub-tab of the **School** tab of the **Current Student Maintenance** window is displayed.



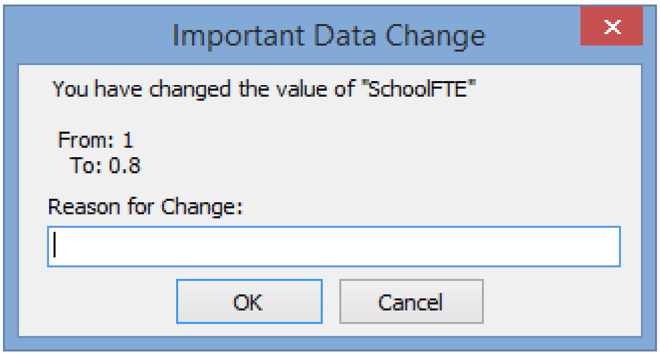
Current Student Maintenance - School tab - Status sub-tab key fields and buttons

Current School area fields and buttons



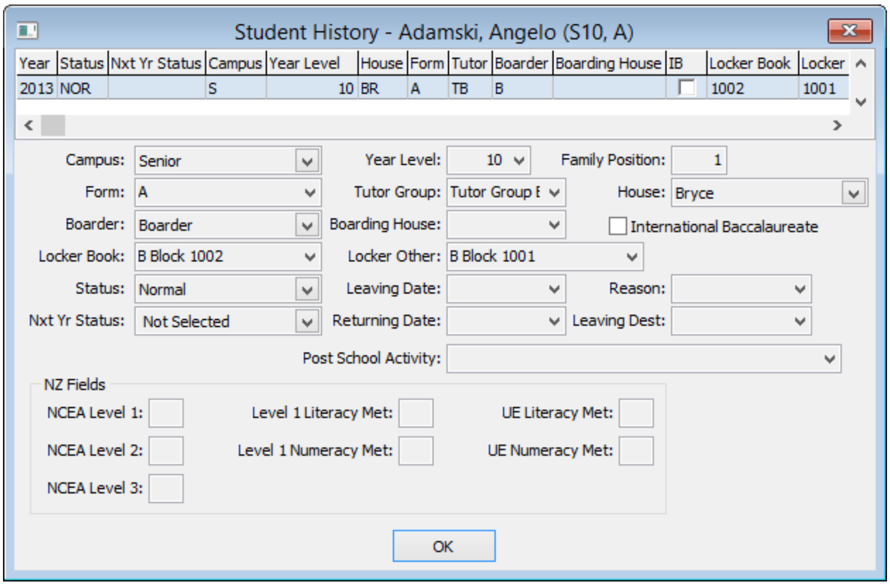
Fields

Field	Description
Campus	Student's campus.
Year Level	Student year level. For NZ MOE roll returns, the **Year Level** is used for the *current year level*.
Schooling Year Offset	Schooling year offset against the year level, if the student has advanced, skipped or repeated a year level. For example, a student that has: • advanced a year level has an offset of **-1** • repeated a year level has an offset of **+1**. For NZ MOE roll returns, the **Year Level** and **Schooling Year Offset** are used to determine a student's funding year level. See *Funding year levels* in the Roll returns manual.
Form	Allocated student form. **Note:** Maintain the values in the **luForm** lookup table. See *luForm lookup table* in the System maintenance manual.
Tutor Group	Allocated student tutor group. For example, students may meet with their tutor before the first period to receive information about forthcoming events and other matters. **Note:** Maintain the values in the **luTutor** lookup table. See *luTutor lookup table* in the System maintenance manual.
House	Allocated house group. **Note:** Maintain the values in the **luHouse** lookup table. See *luHouse lookup table* in the System maintenance manual.
International Baccalaureate	Student is undertaking International Baccalaureate subjects and examinations.

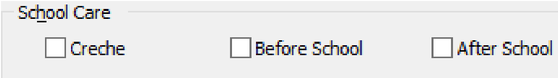
Field	Description
Boarder	Student's residential status. Typical values include: • Boarder • Day Student • Home Stay. **Note:** You can use the **luBoarder** lookup table to maintain entries. See *luBoarder lookup table* in the System maintenance manual. For NZ MOE roll returns, the boarding status of students is required. That is, whether or not they are a boarder. This also affects the student's zoning status; a student boarding at the school hostel cannot be out-of-zone, so **Zone Status** is set to **Not applicable**. See *Current Student Maintenance - NZMOE tab*, *Zone status* in the Roll returns manual.
Boarding House	Boarder's residence, if applicable.
FTE	Full-time equivalent, if student is not full- time. For NZ MOE roll returns, the **FTE** is used to determine a student's part-time or full-time status when fixing errors. See *Roll return errors and warnings* in the Roll returns manual. For NZ MOE roll returns, FTE is calculated by adding together class contact hours, dividing by 20 and rounding to one decimal point. For NZ MOE roll returns, FTE must be 1.0 for all students in Years 1-8 and all students aged <16 in Year 9 above unless the student is an external student (that is, student type EM). The **Important Data Change** window is displayed when the field is changed in New Zealand schools.  Enter the reason for the change in the **Reason for Change** field. This is required by the NZMOE auditors. Changes can be previewed on the **Student Change of Status Report (For Roll Returns)**.
Locker Book	Locker number.
Locker Other	Additional locker number, if required.
Calibre Mark	Special result reporting, if applicable. Only used in **Custom Result Calc Proc**. Can be used in some result standardisation calculations.
Applied for Funding	Select to indicate that your organisation has applied for government funding for the selected student. **Note:** This field is used in the LNSLN export. See *Import/Export Student Data - CEO tab*.

Tip: Import the **Form** OR the **Tutor Group** information from your timetabling software using the Timetable Import Program. See *Importing and exporting timetables* in the Curriculum manual.

Buttons

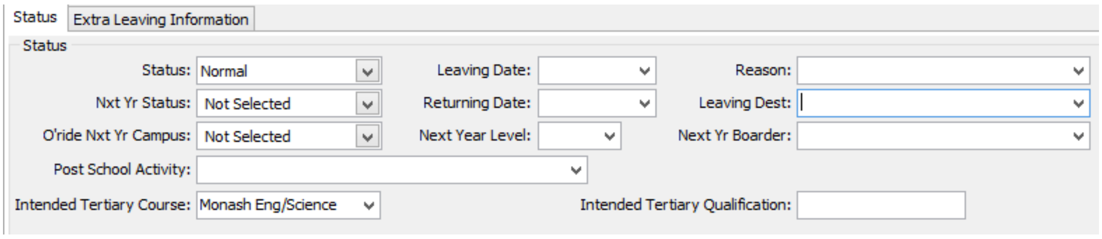
Button	Description
	Display the history of changes to data on the **School** tab. 

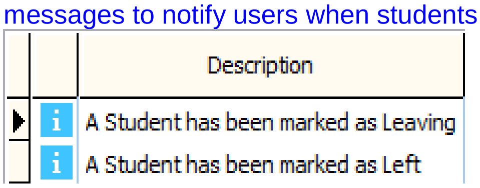
School Care area fields

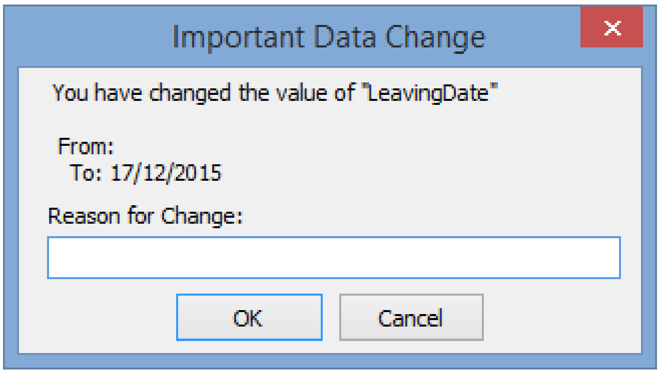


Field	Description
Creche	Select if the student attends creche at your organisation.
Before School	Select if the student attends before school care at your organisation.
After School	Select if the student attends after school care at your organisation.

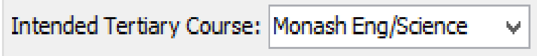
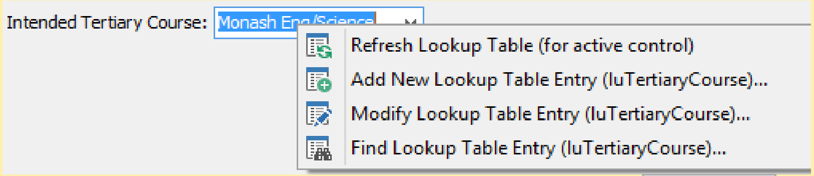
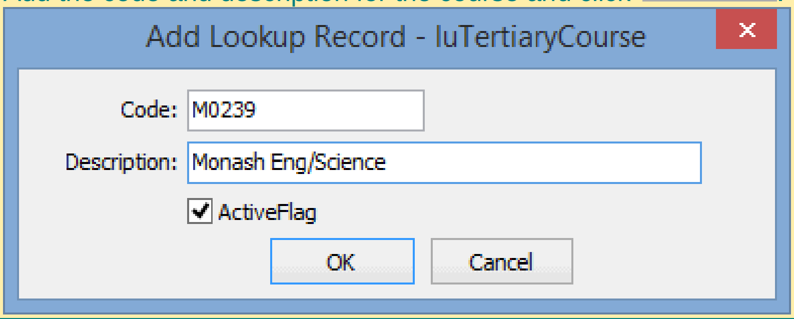
Status sub-tab fields



Field	Description
Status	Student's status. Typical values include: • Exchange • Leaving • Left • Leave of Absence • New Student • Normal • Repeating • Exempt • External. These values are defined by your organisation. See *luStudentStatus lookup table* in the System maintenance manual. See *Creating new academic years* in the Curriculum manual. **Note:** You can maintain subscriptions for the following Action Centre messages to notify users when students are marked as leaving or left.  See *Group Security Maintenance - Groups View* in the System maintenance manual. **Note:** Leave of absence students are not transferred from current students to past students. When a leave of absence student returns, change their status back to normal, and clear the leaving and returning date fields.

Field	Description
Leaving Date	Date the student left your organisation if applicable. **Note:** Students either appear on reports or not based on their leaving date. You can use this field when transferring current students to past students. See *Transferring a group of current students to past students (on page 115)* in the Current students or Next year process manual. For NZ MOE roll returns: • The **Leaving Date** is used for the student's date of last attendance. • School leavers whose **Reason** is **L** (end of schooling), **E** (granted early exemption) or **X** (expelled) must have a **Leaving Date** between 1st March last year and 28th February of the current year (inclusive). The **Important Data Change** window is displayed when the field is changed in New Zealand schools.  Enter the reason for the change in the **Reason for Change** field. This is required by the NZMOE auditors. Changes can be previewed on the **Student Change of Status Report (For Roll Returns)**. **Note:** If the student's status is set as **Leaving** and a date is entered in this field, once this date has passed their status is automatically changed to **Left**.
Reason	Reason the student left your organisation, if applicable. For roll returns, the **Reason** is important as many of the roll return errors depend on this field to determine whether a student is still attending or whether they have left. See *Reason for leaving* in the Roll returns manual.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Nxt Yr Status</td><td>Student's status for the next school year. Values include:
Exchange
Leaving
Left
Leave of Absence
New Student
Normal
Repeating.
Note: Only select if the student's status is unusual. For example, a student leaving the school at the end of Year 10. In most cases (based on the luYearLevel lookup table), Year 12 students are automatically assumed to be leaving. See Creating next semester or term details (on page 83) in the Curriculum manual.</td></tr>
<tr><td>Returning Date</td><td>Select the student's return date if the student is on leave of absence in the current or next academic year.</td></tr>
<tr><td>Leaving Dest</td><td>Student's destination after they leave your organisation. For example their new school or employer's details.</td></tr>
<tr><td>O'ride Nxt Yr Campus</td><td>Specify next year's campus, only if different from the current campus.</td></tr>
<tr><td>Next Year Level</td><td>Level that the student is attending next year.
Note: Use to override the default next year level.</td></tr>
<tr><td>Next Yr Boarder</td><td>Specify next year's boarding arrangements if different from this year's.</td></tr>
<tr><td>Post School Activity</td><td>Intended activity of the student after leaving your organisation.
This is used for NZ MOE roll returns. This only applies if the Reason is either:
L (end of schooling), O (gone overseas) or X (expelled), and they are over 16 years of age
E (early exemption) and they are 15. See Post school activity in the Roll returns manual.</td></tr>
</table>

Field	Description
Intended Tertiary Course	Tertiary course that the student is intending to undertake.  This is usually the course offered to the student by the tertiary admissions organisation, based on the graduating student's preferences. **Note**: We recommend you standardise on the codes your tertiary admissions organisation uses. **Note**: The tertiary course is maintained in the **luTertiaryCourse** lookup table. See *luTertiaryCourse lookup table* in the System maintenance manual. **Tip**: If the entry needs adding and you have security access, right click on this field and select **Add New Lookup Table Entry**.  Add the code and description for the course and click OK. 
Intended Tertiary Qualification	Tertiary qualification that the student intends achieving after leaving school. For example, for the tertiary course example used above, the entry could be **BE/BSc** or **Bachelor of Engineering/Bachelor of Science**.

Next Year fields

Note: Only use the **Next Year** fields if you have not yet created the next student year with the **Create New Semester** program. If it has been created, maintain the next year status in the current year AND the current year status in the next year.

If the student is not returning next year and you have already created the next year, then:

- set the **Nxt Yr Status** field to **LEFT**
- select **File > Delete From Next Year**.

Current Student Maintenance - School tab - Extra Leaving Information sub-tab

If you are a New Zealand school, use the **Extra Leaving Information** sub-tab to maintain:

- intended school region
- up to six intended schools within the region
- teaching and learning notes indicators.

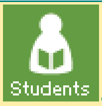
Note: Use the **Status** tab to maintain current and next year status, including dates when leaving and possibly returning. See *Current Student Maintenance - School tab - Status sub-tab* (on page 7).

Opening the Extra Leaving Information sub-tab

To open the **Extra Leaving Information** sub-tab:

1. Select **Module > Students > Current Student Maintenance** from the main menu.

   The **Set Current Student Search Criteria** window is displayed.

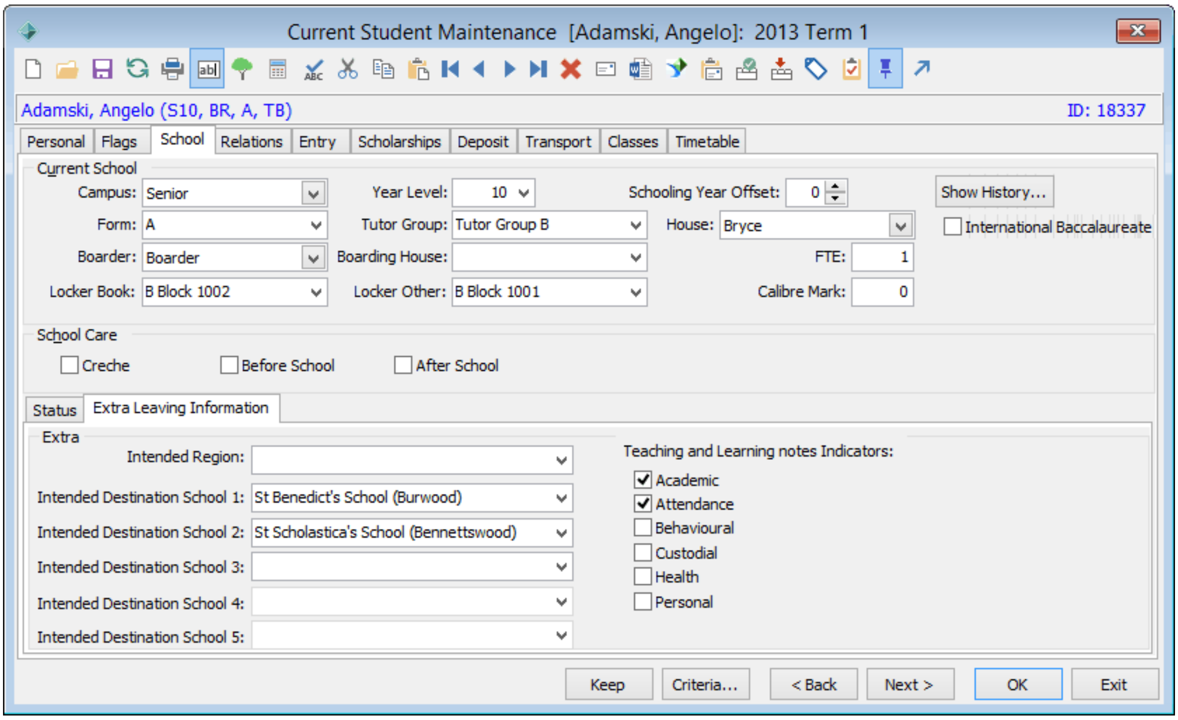
> **Tip:** You can also access the current student functions by clicking 
>
> .

2. Search for the student. See *Searching for existing students* in the Current students manual.
3. Click the **School** tab.

   The **Status** sub-tab of the **School** tab of the **Current Student Maintenance** window is displayed.

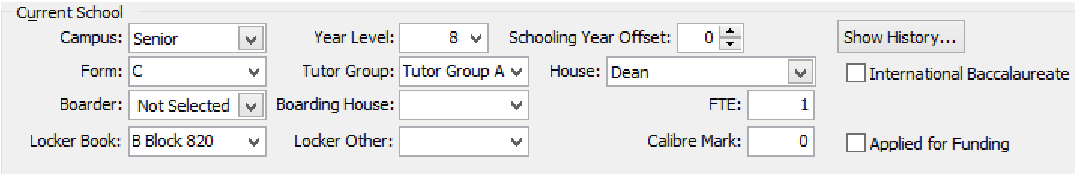
4. Click the **Extra Leaving Information** sub-tab.

   The **Extra Leaving Information** sub-tab of the **Current Student Maintenance** window is displayed.



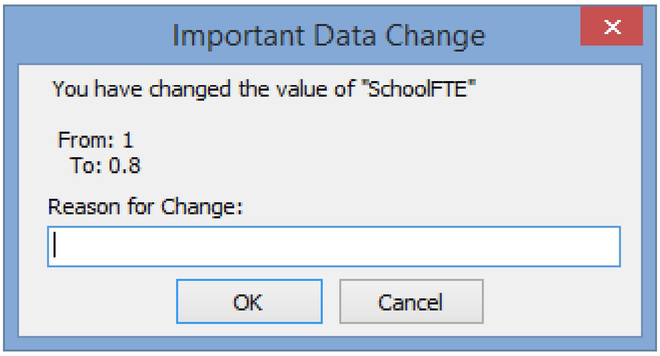
Current Student Maintenance - School tab - Extra Leaving Information sub-tab key fields and buttons

Current School area fields and buttons



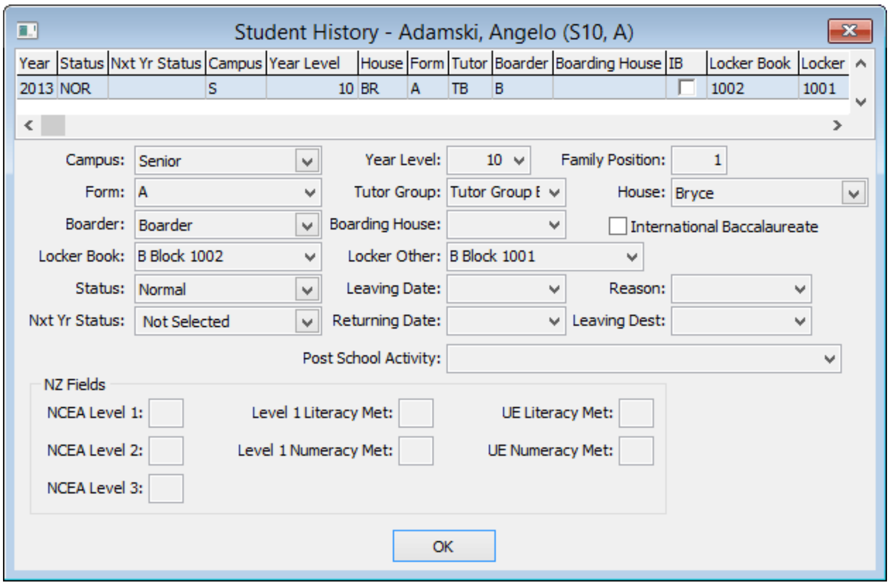
Fields

Field	Description
Campus	Student's campus.
Year Level	Student year level. For NZ MOE roll returns, the **Year Level** is used for the *current year level*.
Schooling Year Offset	Schooling year offset against the year level, if the student has advanced, skipped or repeated a year level. For example, a student that has: • advanced a year level has an offset of **-1** • repeated a year level has an offset of **+1**. For NZ MOE roll returns, the **Year Level** and **Schooling Year Offset** are used to determine a student's funding year level. See *Funding year levels* in the Roll returns manual.
Form	Allocated student form. **Note:** Maintain the values in the **luForm** lookup table. See *luForm lookup table* in the System maintenance manual.
Tutor Group	Allocated student tutor group. For example, students may meet with their tutor before the first period to receive information about forthcoming events and other matters. **Note:** Maintain the values in the **luTutor** lookup table. See *luTutor lookup table* in the System maintenance manual.
House	Allocated house group. **Note:** Maintain the values in the **luHouse** lookup table. See *luHouse lookup table* in the System maintenance manual.
International Baccalaureate	Student is undertaking International Baccalaureate subjects and examinations.

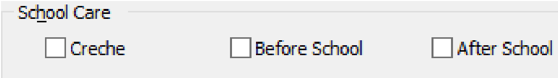
Field	Description
Boarder	Student's residential status. Typical values include: • Boarder • Day Student • Home Stay. **Note:** You can use the **luBoarder** lookup table to maintain entries. See *luBoarder lookup table* in the System maintenance manual. For NZ MOE roll returns, the boarding status of students is required. That is, whether or not they are a boarder. This also affects the student's zoning status; a student boarding at the school hostel cannot be out-of-zone, so **Zone Status** is set to **Not applicable**. See *Current Student Maintenance - NZMOE tab*, *Zone status* in the Roll returns manual.
Boarding House	Boarder's residence, if applicable.
FTE	Full-time equivalent, if student is not full- time. For NZ MOE roll returns, the **FTE** is used to determine a student's part-time or full-time status when fixing errors. See *Roll return errors and warnings* in the Roll returns manual. For NZ MOE roll returns, FTE is calculated by adding together class contact hours, dividing by 20 and rounding to one decimal point. For NZ MOE roll returns, FTE must be 1.0 for all students in Years 1-8 and all students aged <16 in Year 9 above unless the student is an external student (that is, student type EM). The **Important Data Change** window is displayed when the field is changed in New Zealand schools.  Enter the reason for the change in the **Reason for Change** field. This is required by the NZMOE auditors. Changes can be previewed on the **Student Change of Status Report (For Roll Returns)**.
Locker Book	Locker area.
Locker Other	Additional locker area, if required. Sometimes used for keys.
Calibre Mark	Special result reporting, if applicable. Can be used in some result standardisation calculations.

Tip: Import the **Form** OR the **Tutor Group** information from your timetabling software using the Timetable Import Program. See *Importing and exporting timetables* in the Curriculum manual.

Buttons

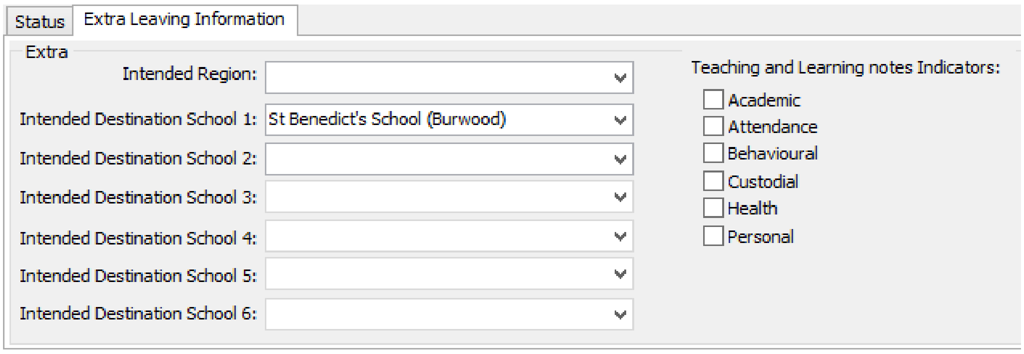
<table>
<tr><th>Button</th><th>Description</th></tr>
<tr><td>
</td><td>Display the history of changes to data on the School tab.

</td></tr>
</table>

School Care area fields

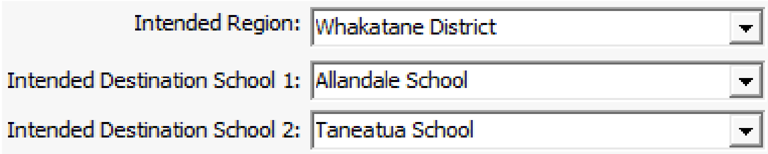


Field	Description
Creche	Select if the student attends créche at your organisation.
Before School	Select if the student attends before school care at your organisation.
After School	Select if the student attends after school care at your organisation.

Extra Leaving Information sub-tab fields



Field	Description
Intended Region	Regional geographic area the student intends to transfer to. Select the intended region from the drop-down list. In the example, the Whakatane district has around 30 schools in the region. 

Field	Description
Intended Destination School	One or more schools that the student intends to transfer to. You can nominate up to six schools.  Select the intended school from the drop-down list.
Teaching and Learning notes Indicators	Whether teaching and learning notes are applicable or not for the following areas: • academic • attendance • behavioural • custodial • health • personal. Select one or more of the checkboxes, as needed.

Creating new students

Students are usually created as future students and then transferred to current students when they start at your organisation. See *Transferring future students to current students (on page 36)* in the Future students or Next year process manual.

To create a new current student from scratch, either:

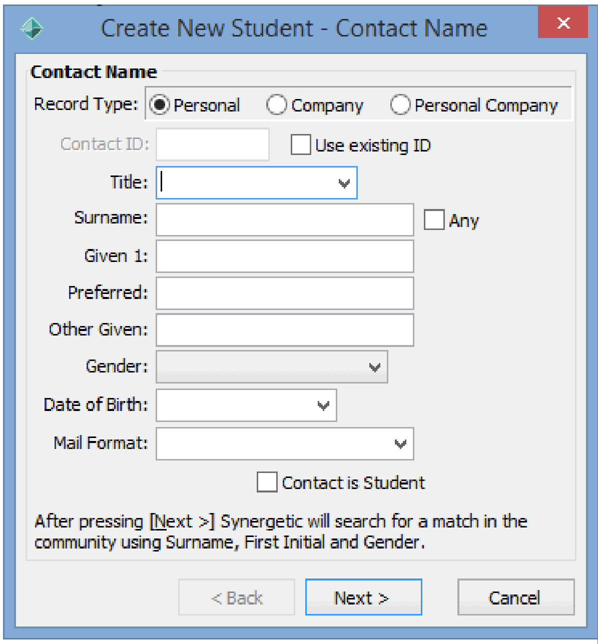
- click New… on the **Set Current Student Search Criteria** window
- click  on the **Current Student Maintenance** toolbar
- select **File > New...** from the main menu
- right click on the **Current Student Selector** grid and select **New...**
- press **Ctrl + N**.

Several data input windows follow. You can navigate < Back and Next > if required.

See *Student creation windows* (on page 24) if you need more information about the windows used when you are creating a new student.

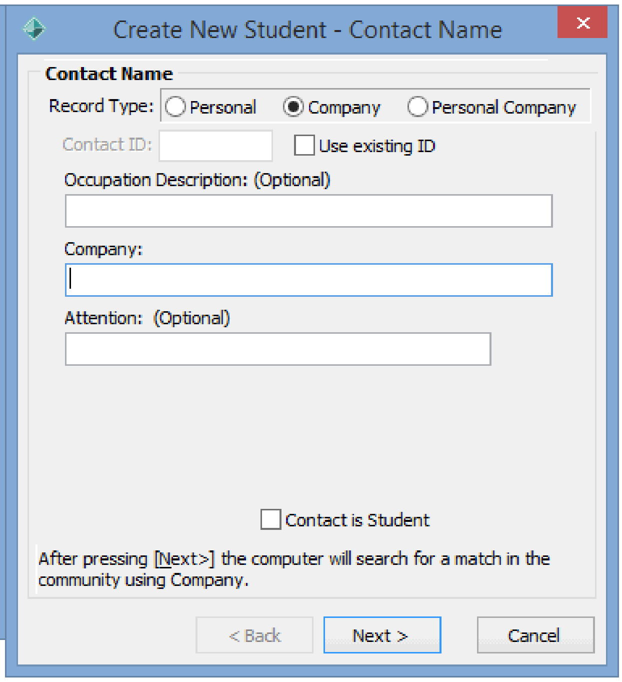
Student creation windows

The **Contact Name** details window is displayed first. Enter primary contact name for the student. The primary contact person can be an individual, a company or an individual at a company address (personal company). The fields on the **Personal** and the **Personal Company Contact Name** windows are identical.



Example of a name details window for a personal or personal company.

The Create New Student window is identical to the Create New Community Member window.



Example of a name details window for a company.

The Create New Student window is identical to the Create New Community Member window.

Enter the primary contact name details for the student. If the information you enter matches one or more members of the community database, Synergetic displays a window showing possible matches.

New contacts can be **Personal**, **Company** or **Personal Company**. Select the appropriate radio button at the top of this window. The data input windows that follow depend on your choice of record type:

- **Personal** is for an individual person or couple.
- **Company** is for a company where the company is the primary contact. For example:
  Jackson Holdings
  Attn: Mr John Roberts
- **Personal Company** is for a company where a person is the primary contact. For example:
  Mrs Anne Johnson
  Salbut Enterprises

If you select **Company**, the windows that follow are similar but do not require any individual personal information.

The following windows are displayed after the name details window, depending on the selections made:

- Spouse details, if applicable. See *Spouse Name window* in the Community manual.
- Address details. See *Address window* in the Community manual.

Note: You can enable the Quick Address System (QAS) to display matching address records as you type into address fields.

Note: You can use the optional **Rapid Addressing Tool** to match addresses with the Australia Post barcode database. See *Maintaining postal addresses* in the System maintenance manual.

- Couple relationship. See *Couple relationship window* in the Community manual.
- Contact's phone and occupation details. See *Phone/Occupation window* in the Community manual.
- Spouse’s phone and occupation details, if applicable. See *Phone/Occupation window* in the Community manual.
- Establish relationships. See *Create New Student - Establish Relationships window (on page 27).*
- School. See *Create New Student - School window* (on page 27).

Create New Student - Contact Name window key fields (Personal)

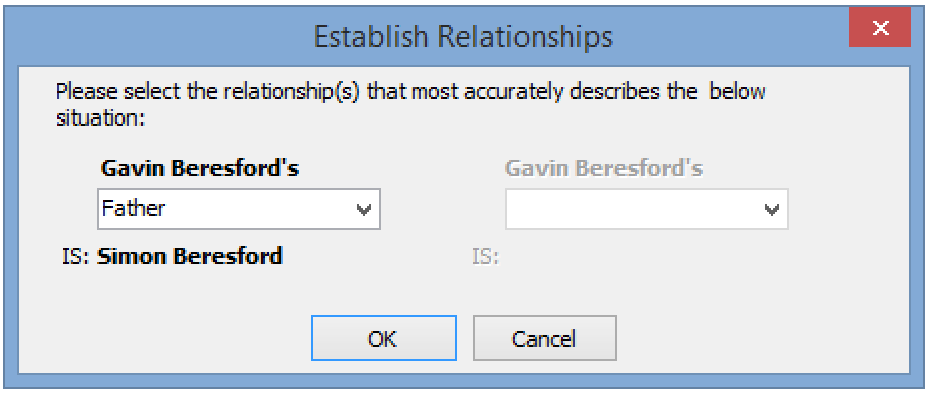
Field	Description
Contact ID **Use Existing ID**	Contact's Synergetic ID number. If the student already exists, select the **Use Existing ID** field and enter the student's Synergetic ID.
Title	Contact's title.
Surname	Contact's surname.
Any	Select the **Any** field to search for community members by: • surname • previous surname • maiden name • override legal surname.
Given 1	Contact's given name.
Preferred	Contact's preferred name. This field is automatically completed with the primary contact's given name. You may type another name if required. For example, if the primary contact's given name is Stephen, you could type Steve.
Other Given	Contact's other given names.
Gender	Contact's gender. This field is automatically completed when you select the primary contact's title. **Note:** For gender neutral titles the gender must be selected. For example, **Dr**.
Date of Birth	Contact's date of birth.
Mail format	Address format for the community member. For example, whether their initials should be used, or an ampersand instead of 'and'.
Contact is Student	Either: • select the field if the contact is also the student • clear the field if not. If the field is selected, the **ParentFlag** configuration setting determines whether either the: • **@PC** constituency (**Current Parent**) • **@SCOC** constituency (**Current Student Other Contact**) is added to the student. See *ParentFlag configuration setting* in the System maintenance manual.

Create New Student - Contact Name key fields (Company)

Field	Description
ID	Contact's Synergetic ID number.
Use existing ID	If you know the Synergetic ID of an existing community member, select this field and enter the ID into the **ID** field. The details of the company are retrieved from the community database.
Occupation Description	Description of the company's main business. For example 'Garden Maintenance'.
Company	Company name.
Attention	Name of recipient within the company if required.

Create New Student - Establish Relationships window

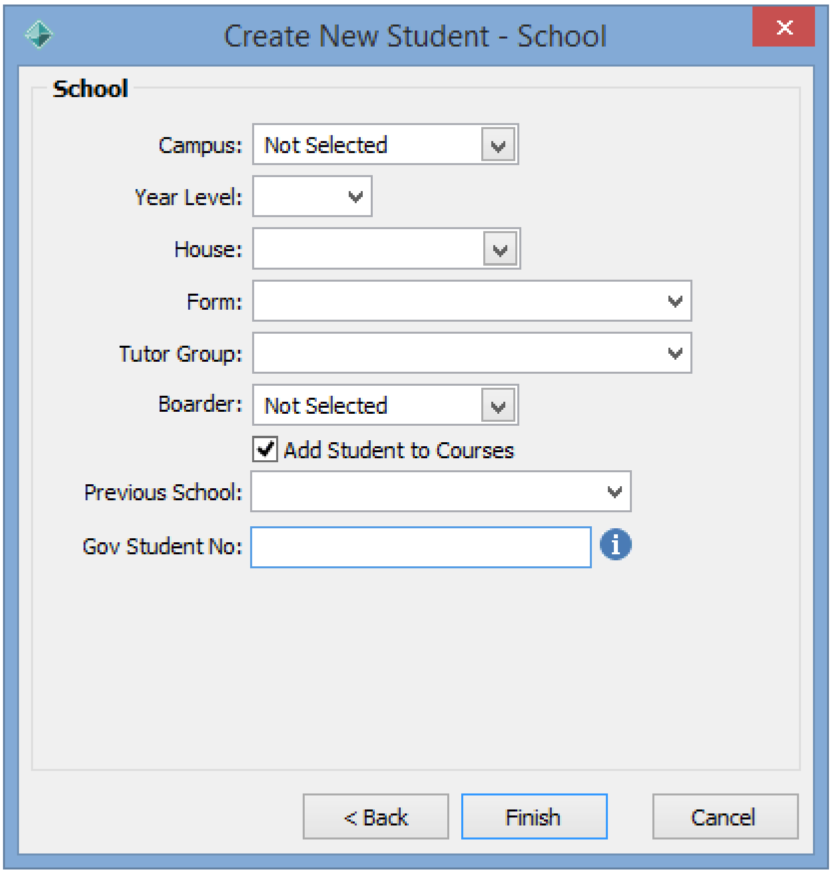
Use the **Establish Relationships** window to describe the student's key relationships. Synergetic automatically completes this window.



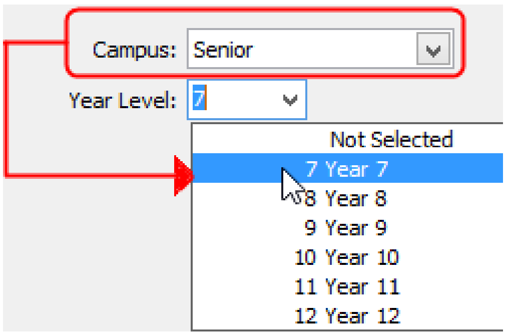
Tip: Check the relationship carefully before you click OK. Make sure that you have not accidentally reversed a relationship, describing the parent as the child and vice versa.

Create New Student - School window

Use the **School** window to enter key schooling details for a student.



Create New Student - School window key fields

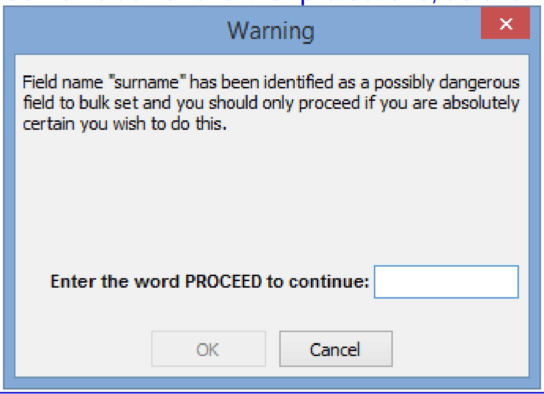
Field	Description
Campus	Campus where the student is enrolled.
Year Level	Student's year level. If you have different year levels at each campus, you can filter the **Year Level** based on the selected **Campus**. In the following example, the **Junior** campus is selected. The **Year Level** drop-down list only shows year levels that apply to the campus. 
House	Student's house.
Form	Student's form.
Tutor Group	Student's tutor group.

Field	Description
Boarder	Student's residential status. Typical values include: • Boarder • Day Student • Home Stay. **Note:** You can use the **luBoarder** lookup table to maintain entries. See *luBoarder lookup table* in the System maintenance manual.
Add Student to Courses	Add student to courses if the **AutoAddCourse** configuration setting is set to **True**. See *AutoAddCourse configuration setting* in the System maintenance manual.
Previous School	Student's previous school. A drop-down list of relevant schools is populated by the **luSchool** lookup table. See *luSchool lookup table* in the System maintenance manual.
Gov Student No	Student number assigned to the student by the government. Type: • **N** if a new VSN (Victorian Student Number) is required • **U** if the student has a VSN but is unsure of the number • the VSN if known. **Note:** Currently used in the State of Victoria, Australia. Also known as VSN.

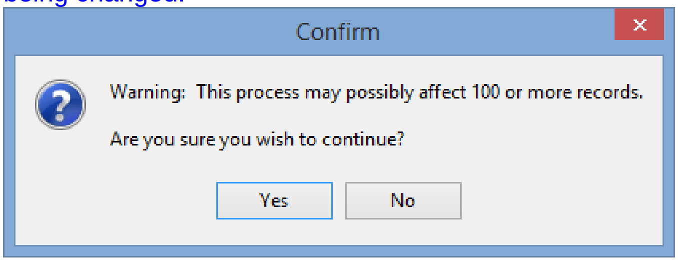
Setting field values in bulk

Field values can be set or changed in bulk on maintenance windows for the selected records, if you have security access to this function.

Note: Reasonable care must be taken when using this feature, as many records can be changed at once. An error can result in excessive manual work to correct the data.
Some fields have further protections, as shown below, so follow the instructions carefully.

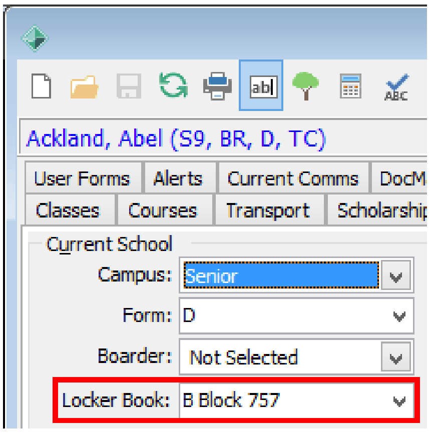


Important note: Changing records in **Community Maintenance** could result in excessive time being taken by Synergetic, as each community record could result in a cascade of other records being changed.



Access to this function can be set by the system administrator using the **SYS | MaintProgramBulkSetValue** security resource.

In the following example, the **Locker Book** field in **Current Student Maintenance** is being set for several records.



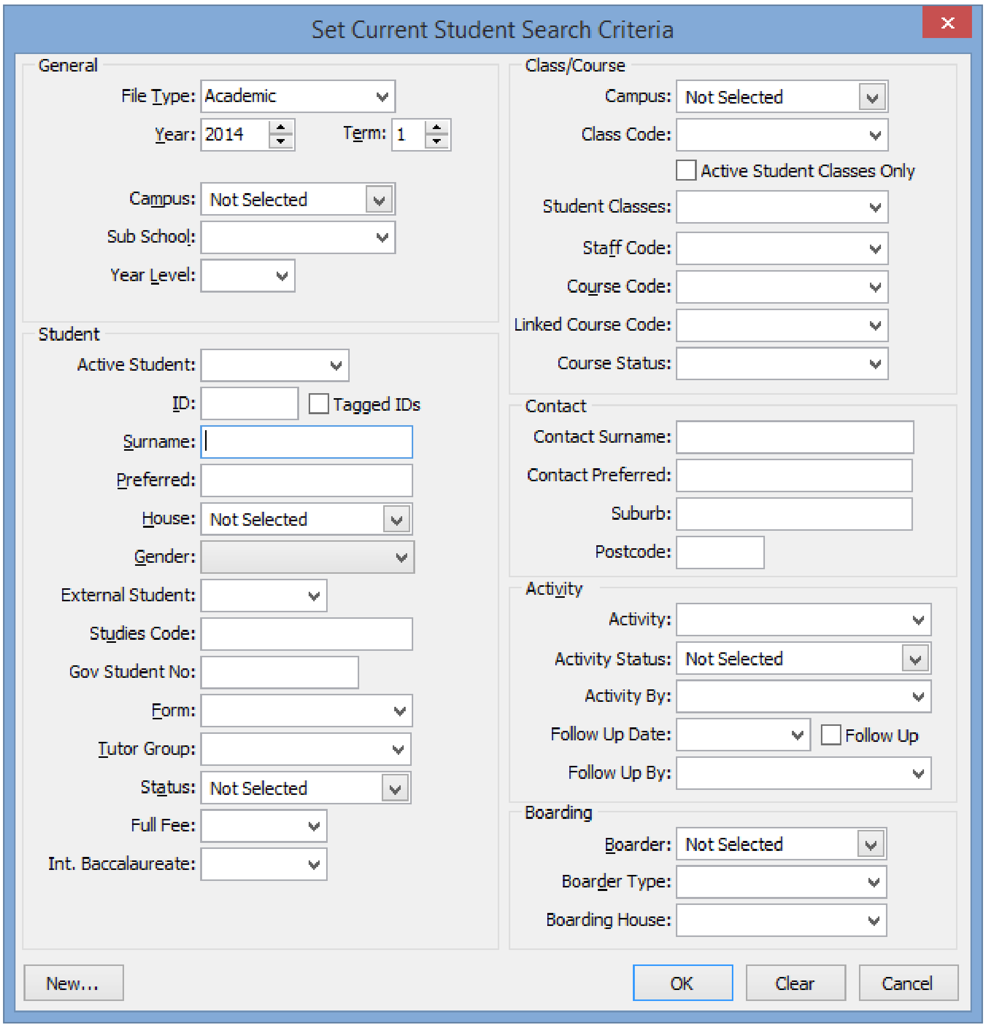
To set or change a field value in bulk for the selected group of records:

1. Navigate to the function which has the field to be changed.

   For example, select **Module > Students > Current Student Maintenance** if you are changing a field in **Student Maintenance**.

   The relevant **Search Criteria** window is displayed.

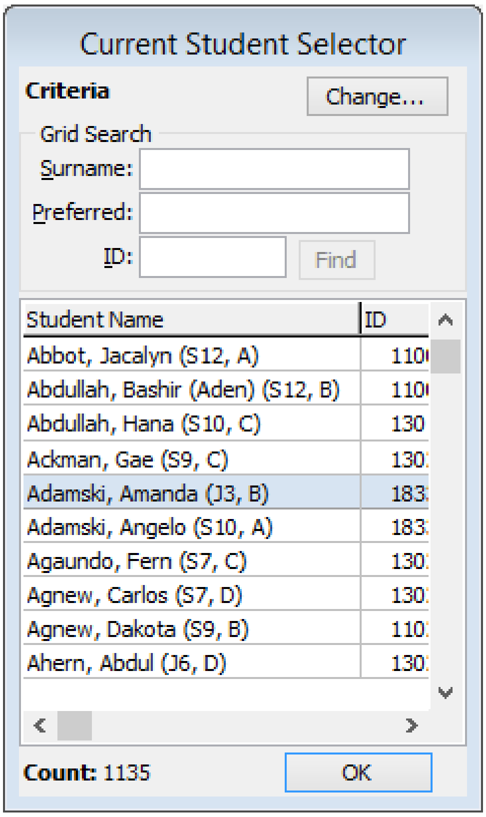
2. Filter the records to apply the change to.



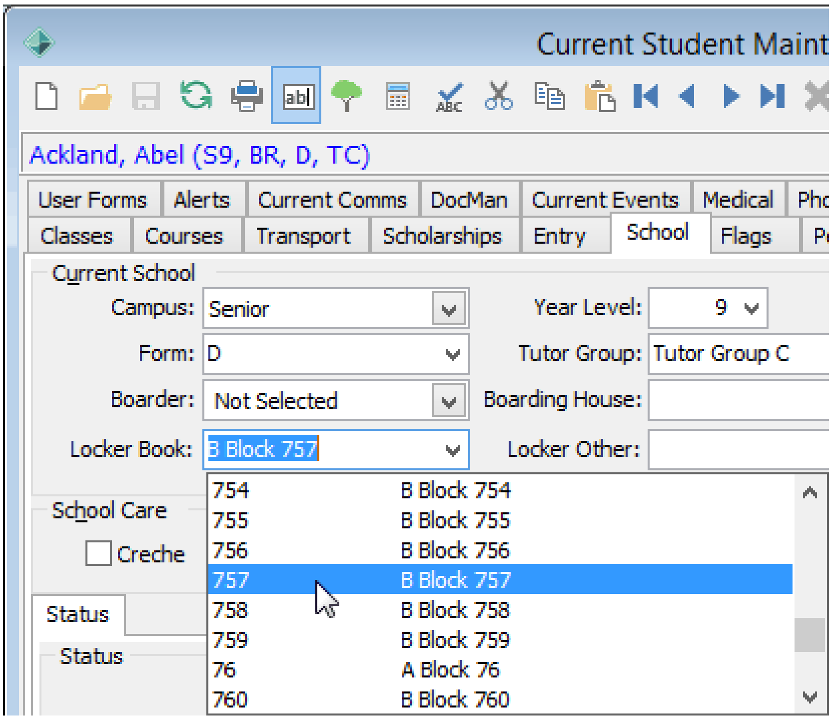
Tip: You can use other filtering techniques such as tagging records then selecting the **Tagged IDs** field. See *Tagging community records for later use* in the Introduction manual.

3. Click OK.

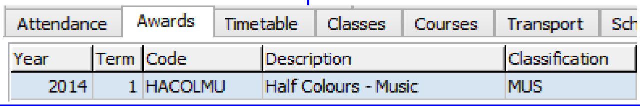
   The **Selector** grid is displayed with the selected community members.



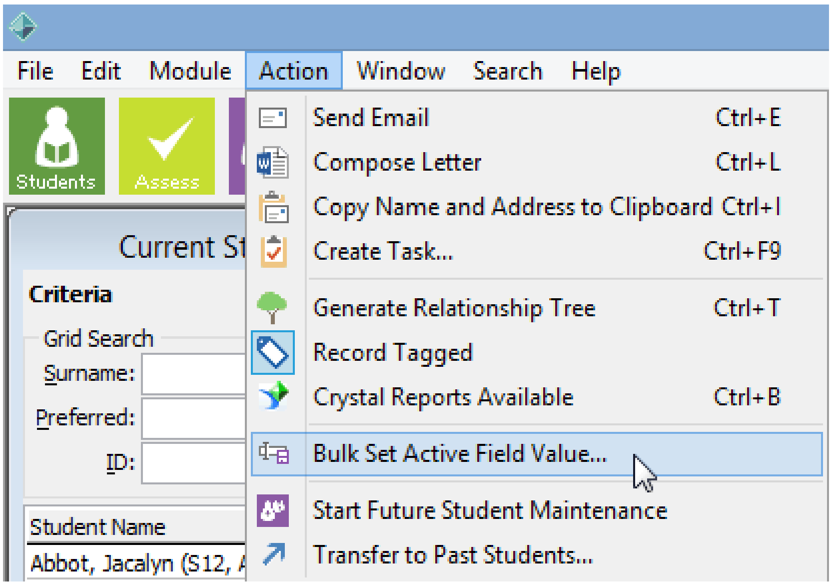
4. Either select or type the value in the maintenance window.



Note: Synergetic can only process fields common to all records. For example, the grid area fields on the **Award** tab cannot be processed.



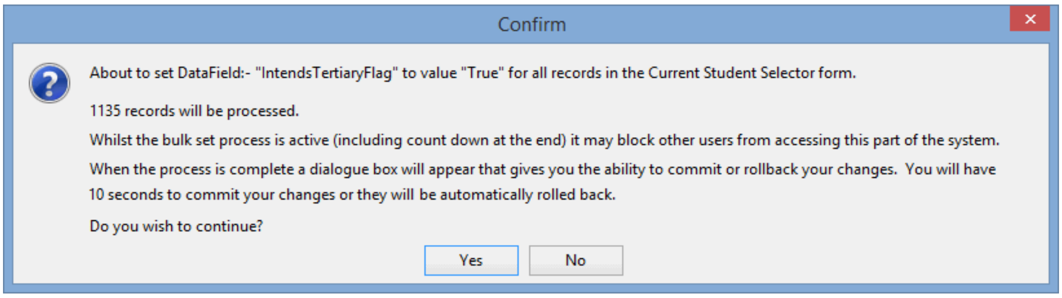
5. Select **Action > Bulk Set Active Field Value**.



Note: Make sure that you do not move the focus away from the selected field. For example, the dashed border around the following field name indicates that the field is in focus.

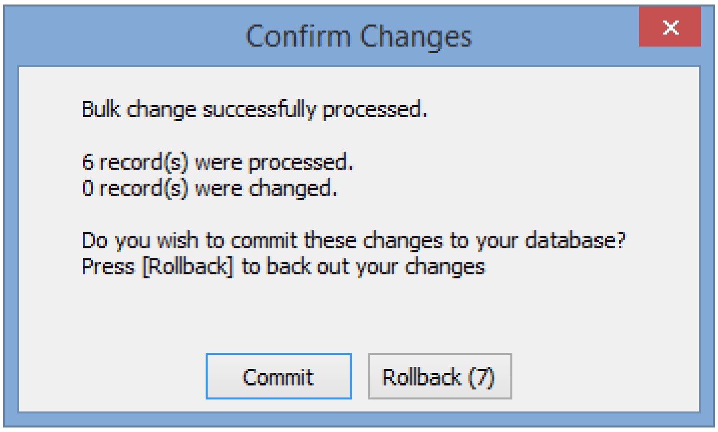
If in doubt, select the field again.

The following window is displayed.



6. Click Yes.

   The selected records are processed in turn. Any records with fields that need changing are locked and held for updating, while those with the same value already are skipped. During this time, another user cannot update the selected field for these records.

7. Either:

   - click Commit within 10 seconds to confirm the changes to the selected records
   - click Rollback (7) to cancel the changes immediately
   - allow the rollback to count down and cancel the changes automatically.

Transferring future students to current students

When the time comes for new students to be introduced to your organisation, you need to transfer confirmed future students with their existing details and make them current students.

Before transferring the students:

- Update the application of any future students who cancel next year's enrolment. See *Updating a cancelling future student's application* (on page 37).
- Update the application of any future students who defer their enrolment to a later year. See *Updating a deferring future student's application* (on page 39).

You can either transfer future students individually or you can transfer a group of students in bulk. To transfer:

- An individual student, see *Transferring individual future students to current students* (on page 42) in the Future students manual.
- A group of students, see *Transferring future students in bulk to current students* (on page 45) in the Future students manual.

Updating a cancelling future student's application

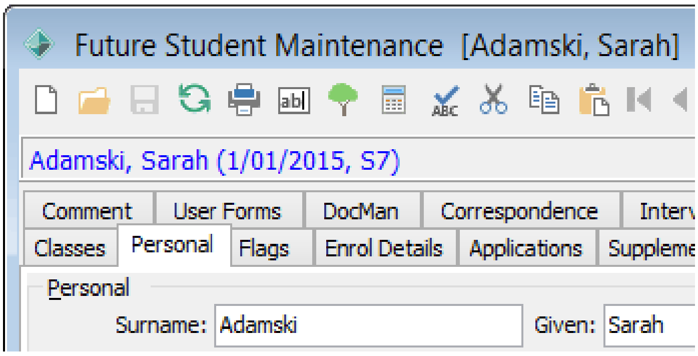
If a confirmed future student cancels, update their application **before** the new academic year is created so that they are not transferred to current students.

> **Note:** If a confirmed future student cancels **after** the new academic year has been created, you need to remove them from the new academic year manually. See *Removing a confirmed future student who cancels after the new year is created* (on page 102).

To cancel a future student's application:

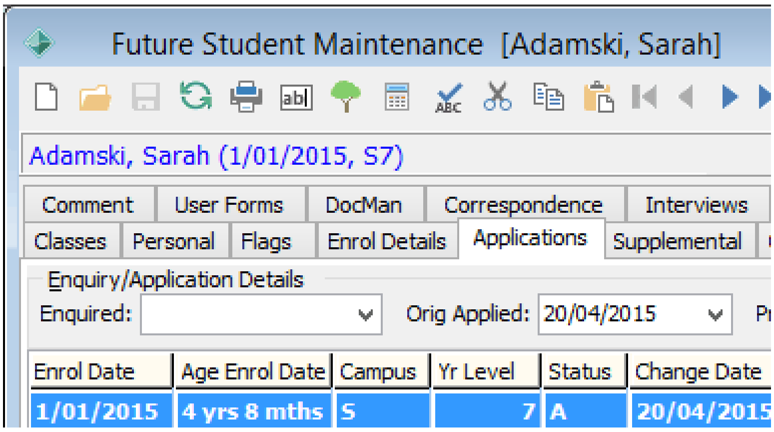
1. Search for the student in **Future Student Maintenance**. See *Searching for future students* in the Future students manual.

   The **Personal** tab of the **Future Student Maintenance** window is displayed.

2. Click the **Applications** tab.

   The **Applications** tab of the **Future Student Maintenance** window is displayed. See *Future Student Maintenance - Applications tab* (on page 49) in the Future students manual.

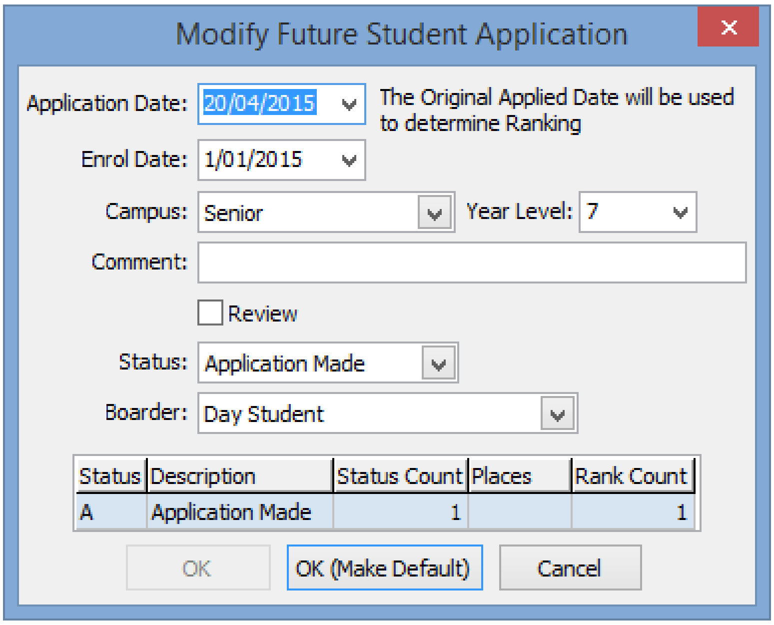
   

3. Click 

   .

   The **Modify Future Student Application** window is displayed.

4. Select **Cancelled** from the **Status** drop-down list. See *Modifying future student enrolment applications* (on page 57) in the Future students manual.



5. Click 

.

The **Applications** tab of the **Future Student Maintenance** window is displayed.

Updating a deferring future student's application

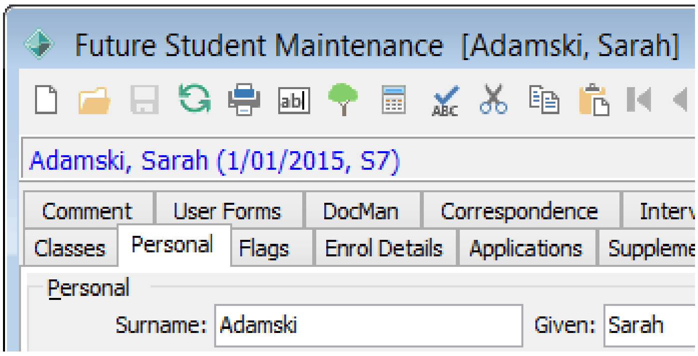
If a confirmed future student defers, update their application **before** the new academic year is created so that they are not transferred to current students.

Note: If a confirmed future student defers **after** the new academic year has been created, you will need to remove them from the new academic year manually and perform other steps. See *Removing a confirmed future student who defers after the new year is created* (on page 105) in the Curriculum or Next year process manual.

To defer a future student's application:

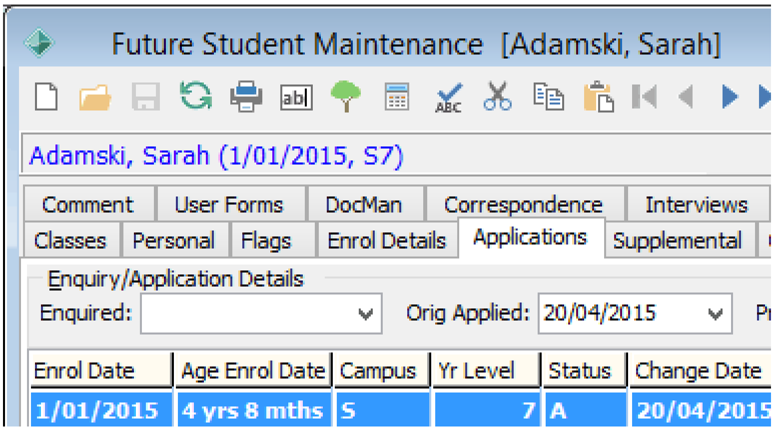
1. Search for the student in **Future Student Maintenance**. See *Searching for future students* in the Future students manual.

   The **Personal** tab of the **Future Student Maintenance** window is displayed.

2. Click the **Applications** tab.

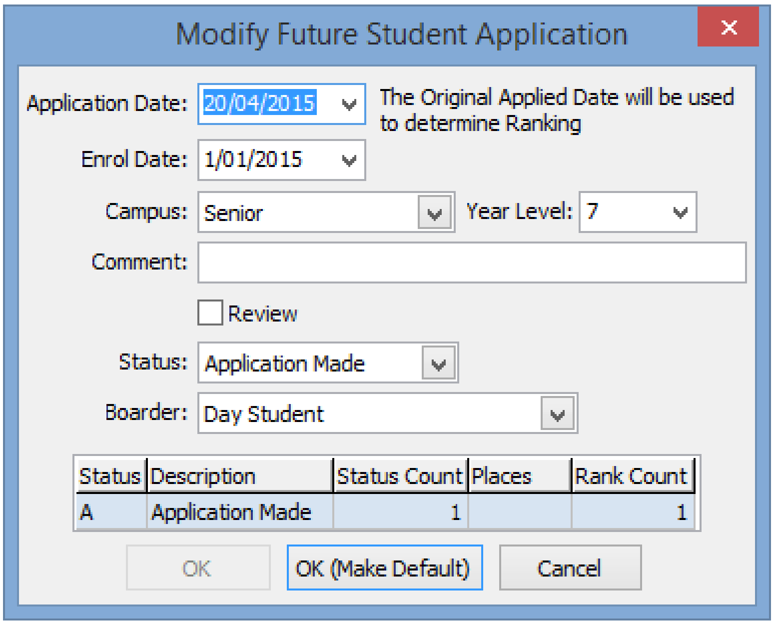
   The **Applications** tab of the **Future Student Maintenance** window is displayed. See *Future Student Maintenance - Applications tab* (on page 49) in the Future students manual.

3. Click Modify.

   The **Modify Future Student Application** window is displayed.

4. Select **Cancelled** from the **Status** drop-down list. See *Modifying future student enrolment applications* (on page 57) in the Future students manual.



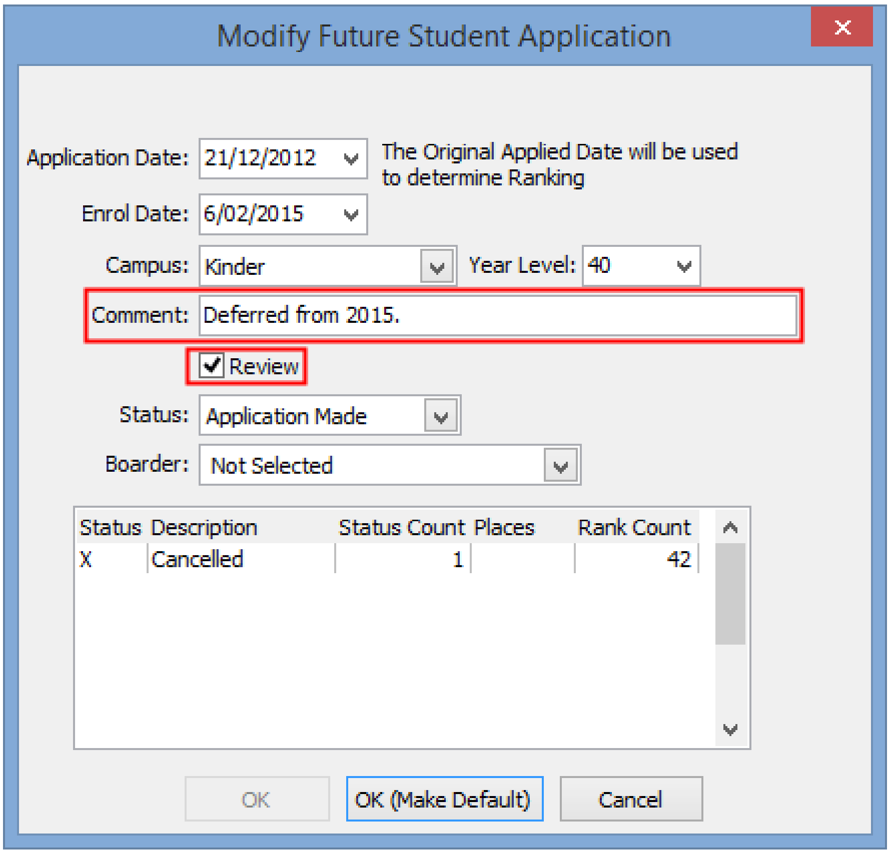
5. Click 

.

The **Applications** tab of the **Future Student Maintenance** window is displayed.

6. Create a new enrolment application, according to your organisation's policy for deferred applications. For example, you might:
   - set the **Application Date** to the application date of the original application
   - add a **Comment** that the application is deferred
   - select the **Review** field for further follow up.

   See *Creating future student enrolment applications* (on page 54) in the Future students manual.

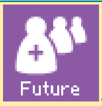


Transferring individual future students to current students

To transfer an individual future student to current students:

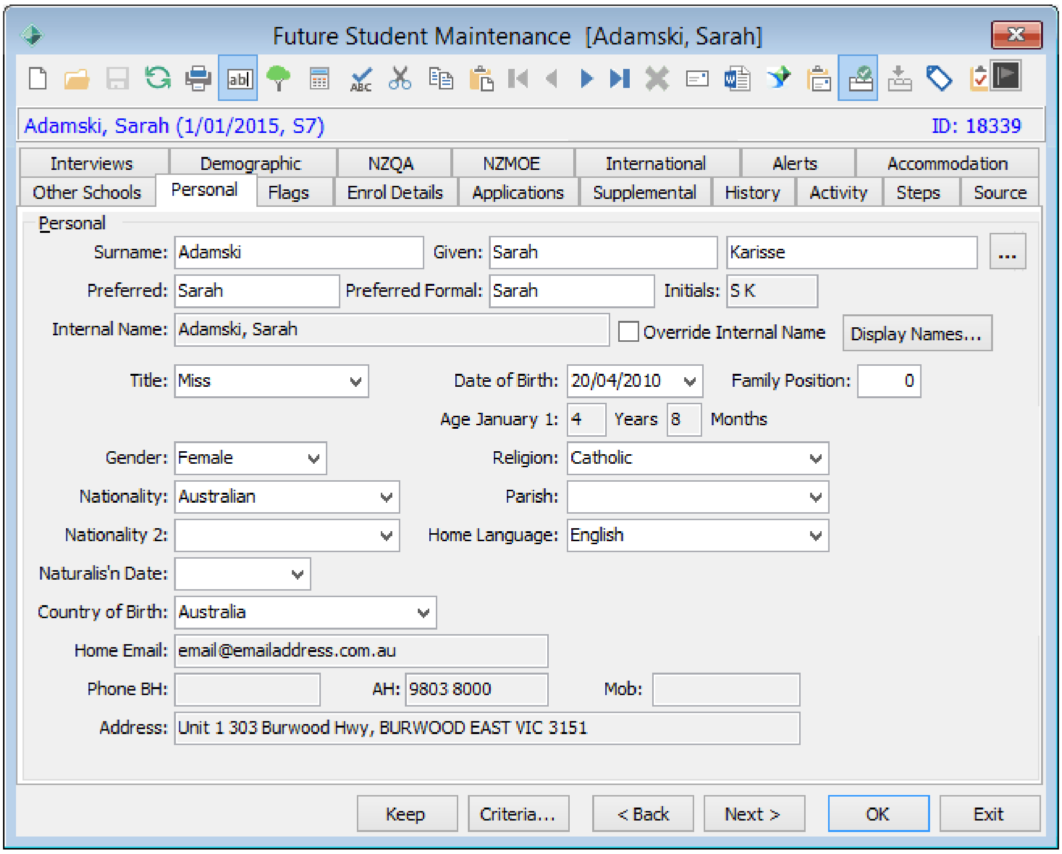
1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

   The **Set Future Student Search Criteria** window is displayed.

   Tip: You can also access the future student functions by clicking 

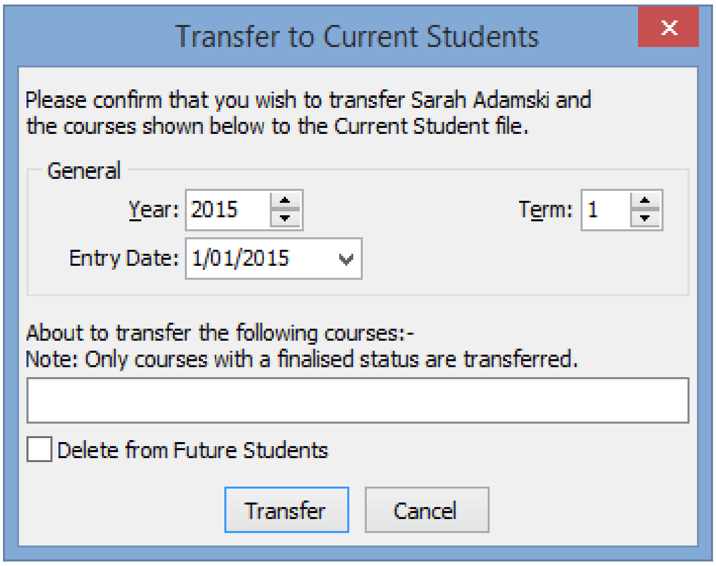
   .

2. Search for the future student. See *Searching for future students*.
3. The **Personal** tab of **Future Student Maintenance** is displayed.



4. Click the transfer icon .

   The **Transfer to Current Students** window is displayed.



5. Select the **Delete from Future Students** field, if required at your organisation.

Transfer to Current Students window key fields

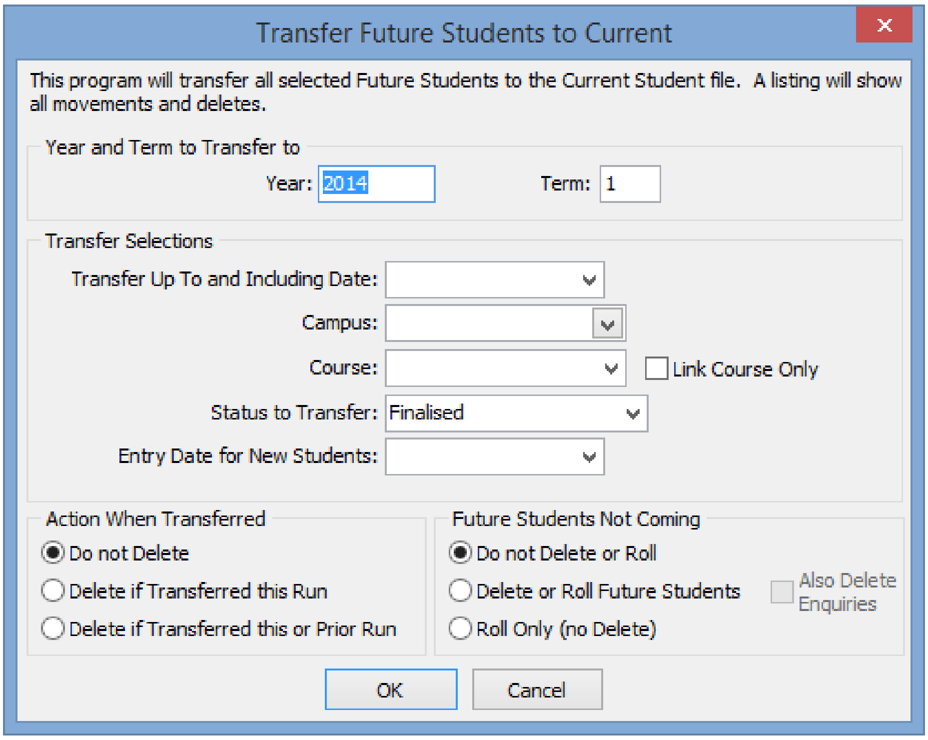
Field	Description
Year / Term	Year and term when the current student will commence at your organisation.
Entry Date	Entry date for the future student being transferred. Generally, they are transferred into the first day of the semester.
Delete from Future Students	Select to delete the record from future students. **Tip:** We recommend that you transfer without deleting at the end of the current year for the next year. Then in the next year, delete those not coming. Some organisations leave students in future students while they are of school age. However, due to the archive capability this is not normally required.

Transferring future students in bulk to current students

To transfer a group of future students to past students:

1. Select **Module > Future Students > Transfer Future Students to Current Student File**.

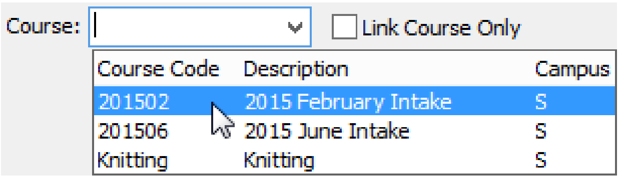
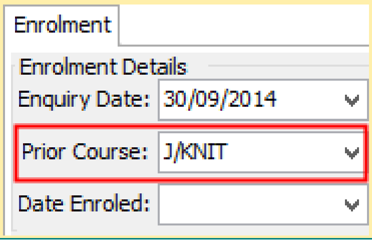
   The following dialog is displayed.



2. Enter the **Year** and **Term** to transfer to.
3. In the **Transfer Selections** area, select the set of student records to transfer using the date and schooling options.
4. In the **Action when transferred** area, select what to do with the old future student records after the transfer.

   If you do not delete these files, they will still be linked to the current student files. Deleted future student records can still be accessed in the future student archive. See *Searching for future students*.
5. In the **Future Students not coming** area, select what to do with the records of students who decline the offer of a place.

Transfer Future Students to Current window key fields

Field	Description
Year and Term to Transfer to	Year and term when the current students commence at your organisation.
Transfer Up To and Including Date	Transfer students up to and including the **To Start on** date field on the **Enrol Details** tab of **Future Student Maintenance**. See the *Future Student Maintenance - Enrol Details tab*.
Campus	Campus where the future student is enrolled. Leave blank to transfer the student regardless of the entry campus.
Course	Course that the future student is enrolled in.  Leave blank to transfer the student regardless of the course.
Link Course Only	Select the common course that feeder courses link to. For example, a main course may have a feeder course that starts earlier or later than the actual main course. The default value is its own course code. **Tip**: You can update the **Prior Course** field on the **Enrolment** tab of **Course Details Maintenance**. See the *Course Details Maintenance - Enrolment tab*. 
Status to Transfer	Status of the future students to be transferred. Typical values are: • **Application Made** • **Deferred** • **Finalised** • **Place Offered** • **Reserved** • **Waitlist** • **Cancelled**. **Note:** Generally, future students are only transferred to the current student file if their status is **Finalised**. Otherwise, select the students with a particular status to be transferred. Your organisation may use another status to determine students to be accepted into your organisation. This is maintained in the **luFutureStatus** lookup table. See the *luFutureStatus lookup table* in the System maintenance manual.

Field	Description
Entry Date for New Students	Entry date for all future students transferred on this run. Generally, they will be transferred into the first day of the semester. **Note:** This is stored in the **Entry Date** field on the **Entry** tab of the **Current Student Maintenance** window. See the *Current Student Maintenance - Entry tab* in the Current students manual.
Action When Transferred	Action to be taken with the records in the future student database after the transfer.
Future Students Not Coming	The records for the future students who have enrolled at your organisation but have decided not to continue with their enrolment can either be: • deleted • rolled • left in the database for future reference. For example, the student may change their mind and enrol at your organisation again. Select the relevant **Future Students not coming** radio button to make your selection. Rolling future students not coming uses the 2nd and 3rd choice enrolments on the **Supplemental** tab in **Enquiry Student Maintenance**. If the first choice enrolment ended with a status other than that of **Finalised**, then the 2nd choice enrolment is rolled up to the 1st choice. **Tip:** We recommend that you transfer without deleting at the end of the current year for the next year. Then in the next year, delete those not coming. Some organisations leave students in future students while they are of school age. However, due to the archive capability this is not normally required.
Also Delete Enquiries	Delete enquiries that match the selected criteria and have a start date on or before the **Transfer Up To and Including Date**.

Printing out transferred students

After the transfer has been run, Synergetic prints a list of all of the students that were affected by the transfer. The list shows ID, name, campus, year level, application date, enrolment date and the process types. The list can show multiple processes.

The process types are as follows:

- T = Transferred to Current Students
- D = Deleted from Future Students
- R = Future Student Enrol Details Rolled Up (if using multiple applications).

Future Student Maintenance - Applications tab

Use the **Applications** tab to view and maintain details about enrolment applications.

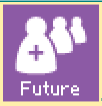
The applications are based on their order of entry into the system within date. The default application, that is, the applicant's first choice, is displayed in bold.

Opening the Applications tab

To open the **Applications** tab:

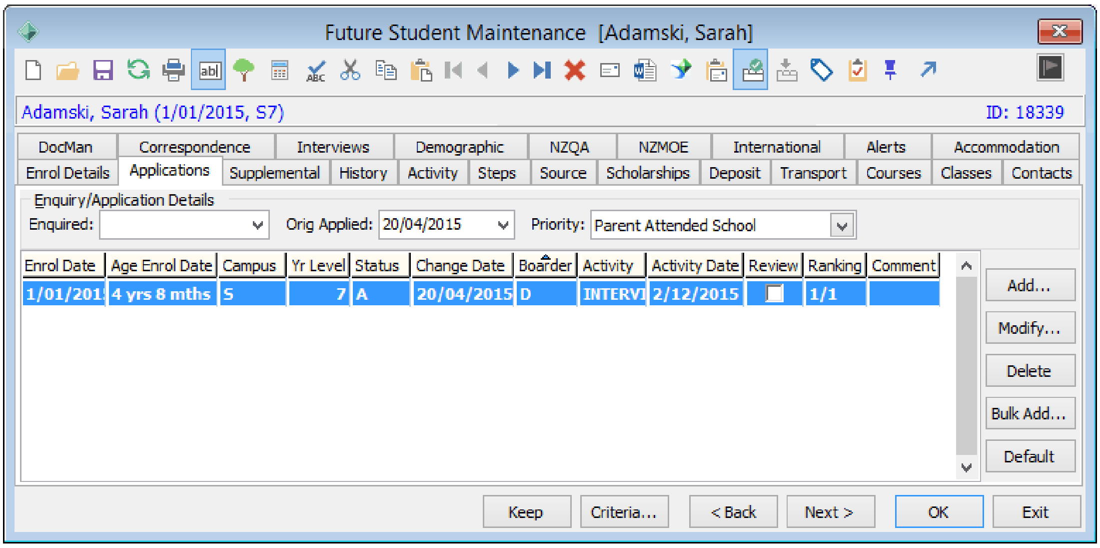
1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

   The **Set Future Student Search Criteria** window is displayed.

   Tip: You can also access the future student functions by clicking .

2. Search for the future student. See *Searching for future students*.
3. Click the **Applications** tab.

   The **Applications** tab of the **Future Student Maintenance** window is displayed.



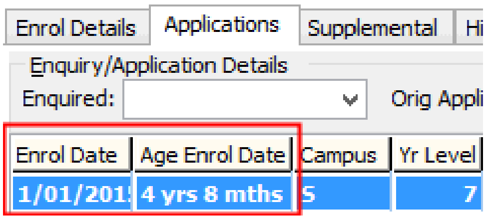
Future Student Maintenance - Applications tab key fields and buttons

Enquiry/Application Details area fields

Field	Description
Enquired	Date of the first enquiry for enrolment of the student.
Orig Applied	Date that the first application was received for enrolment.
Priority	Priority category that the application has been assigned to.

Grid area fields

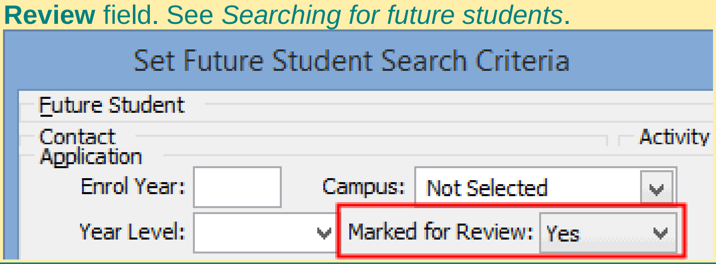
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Category</td><td>Category for the application.

Note: This grid field is only visible if the UseApplicationCategory configuration setting is True. See UseApplicationCategory configuration setting.</td></tr>
<tr><td>Enrolment Date</td><td>Date the future student has applied to enrol at the campus starting at the specified year level.</td></tr>
<tr><td>Age at Enrolment</td><td>Student's age at the enrolment date of the application. This is calculated from the:
Enrol Date field
Date of Birth field, updated on the Personal tab.


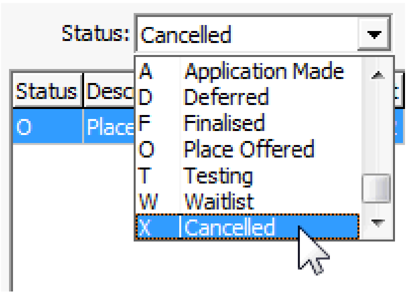
Note: If 1/1 (1st January) is entered in the Enrol Date field, the value is calculated from the first day of the first term of the specified year. If the actual start date is entered, the value is calculated based on this date.</td></tr>
<tr><td>Campus</td><td>Future student's campus.</td></tr>
<tr><td>Year Level</td><td>Future student's year level.</td></tr>
</table>

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Status</td><td>Status of the future student's application.
The typical default options are:
<table>
<tr><th>Status</th><th>Description</th></tr>
<tr><td>A</td><td>Application made.</td></tr>
<tr><td>D</td><td>Deferred.</td></tr>
<tr><td>F</td><td>Finalised.</td></tr>
<tr><td>O</td><td>Place Offered.</td></tr>
<tr><td>W</td><td>Waitlisted.</td></tr>
<tr><td>X</td><td>Cancelled by the applicant.</td></tr>
</table>
Note: Use the luFutureStatus lookup table to maintain entries. See the luFutureStatus lookup table in the System maintenance manual.

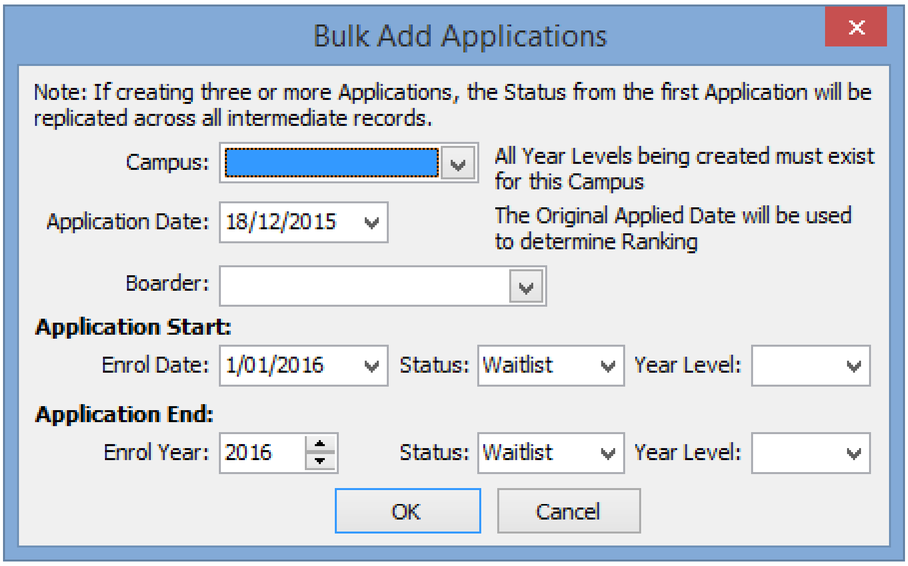
Tip: You can create mail merge letters using the crspFutureStatusChangePrint stored procedure. See Printing mail merge letters using an existing document in the Extracting data manual. The luFutureStatus table is linked to the luFutureStatusMerge lookup table using its MergeCode. When a status is changed, its MergeCode is also changed as well. Any applications with this MergeCode are selected by the stored procedure.</td></tr>
<tr><td>Status Changed</td><td>Date the application was last updated. For example, the application may have been updated because the:
person changed their mind about their first choice for year of enrolment
status was altered.</td></tr>
<tr><td>Boarder</td><td>Boarding status of the application.</td></tr>
<tr><td>Activity</td><td>Activity associated with the application.</td></tr>
<tr><td>Activity Date</td><td>Date of the associated activity.</td></tr>
<tr><td>Review</td><td>Mark the record for future review or follow up.

Tip: When searching for future students, you can display all the applications that require review by selecting Yes in the Marked for Review field. See Searching for future students.

</td></tr>
<tr><td>Ranking</td><td>Ranking applied to this application. See How ranking works.</td></tr>
<tr><td>Application date</td><td>Date the application was created.</td></tr>
<tr><td>Comment</td><td>Any comments on the applications.</td></tr>
</table>

Buttons

Button	Description
Add...	Create an enrolment application. See *Creating future student enrolment applications* (on page 54). **Tip:** You can create mail merge letters using the **crspFutureStatusChangePrint** stored procedure. See *Printing mail merge letters using an existing document* in the Extracting data manual.
Modify...	Modify the highlighted enrolment application. See *Modifying future student enrolment applications* (on page 57). **Tip:** Double click the required application to modify the details.
Delete	Delete the highlighted enrolment application. **Tip:** We suggest that you cancel an application rather than deleting it so that you can maintain a history for the applicant. To cancel an application: 1. Highlight the application on the **Applications** tab. 2. Click Modify... . 3. Select **Cancelled** from the **Status** drop-down list. 

<table>
<tr><th>Button</th><th>Description</th></tr>
<tr><td>Bulk Add...</td><td>Create future student applications in bulk.



See Creating future student applications in bulk.</td></tr>
<tr><td>Default</td><td>Make the highlighted application the applicant's first choice.</td></tr>
</table>

Creating future student enrolment applications

To create a new application for a future student:

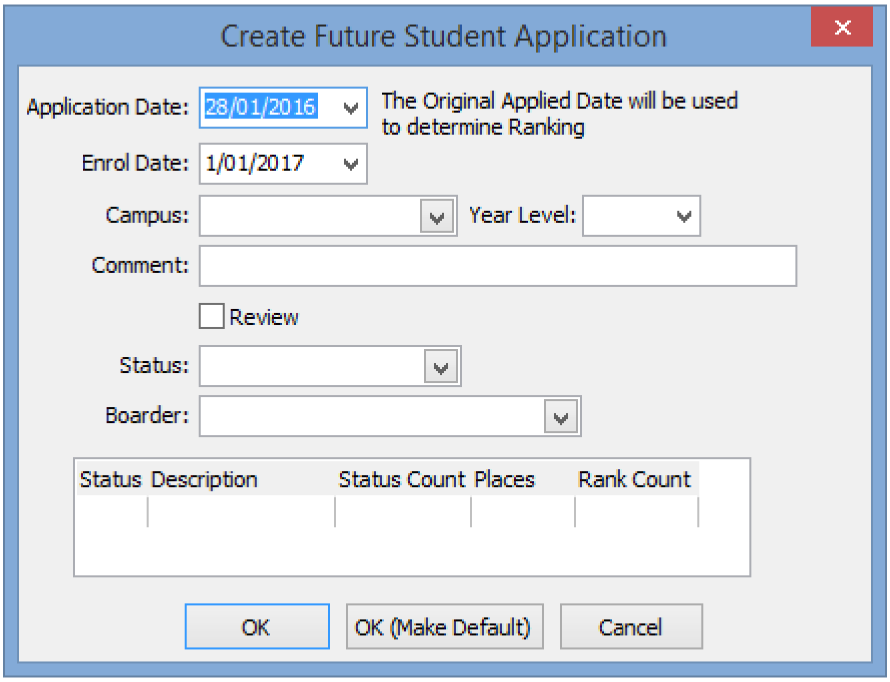
1. Open the **Applications** tab in **Future Student Maintenance**. See *Future Student Maintenance - Applications tab* (on page 49).

   The **Applications** tab of the **Future Student Maintenance** window is displayed.

2. Click 

.

   The **Create Future Student Application** window is displayed.



Create Future Student Application window key fields and buttons

Fields

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Category</td><td>The category for the application, if applicable.
Note: This field may not be available at your organisation.</td></tr>
<tr><td>Application Date</td><td>Date of this application or default date.
Note: The original application date is used to determine the ranking of enrolment applications. You can change the ranking. See Future Student Maintenance - Applications tab (on page 49).</td></tr>
<tr><td>Enrol Date</td><td>Date the future student is applying to be enrolled for.</td></tr>
<tr><td>Campus</td><td>Campus the future student is enrolling in, for this application.</td></tr>
<tr><td>Year Level</td><td>Year level the future student is enrolling in, for this application.</td></tr>
<tr><td>Comment</td><td>Any comments about the application.</td></tr>
<tr><td>Review</td><td>Mark the application for further review or follow up.
Tip: When searching for future students, you can display all the applications that require review by selecting Yes in the Marked for Review field. See Searching for future students.</td></tr>
<tr><td>Status</td><td>Status of the future student's application.
The typical default options are:
<table>
<tr><th>Status</th><th>Description</th></tr>
<tr><td>A</td><td>Application made.</td></tr>
<tr><td>D</td><td>Deferred.</td></tr>
<tr><td>F</td><td>Finalised.</td></tr>
<tr><td>O</td><td>Place Offered.</td></tr>
<tr><td>W</td><td>Waitlisted.</td></tr>
<tr><td>X</td><td>Cancelled by the applicant.</td></tr>
</table>
Note: Use the luFutureStatus lookup table to maintain entries. See the luFutureStatus lookup table in the System maintenance manual.
Tip: You can create mail merge letters using the crspFutureStatusChangePrint stored procedure. See Printing mail merge letters using an existing document in the Extracting data manual. The luFutureStatus table is linked to the luFutureStatusMerge lookup table using its MergeCode. When a status is changed, its MergeCode is also changed as well. Any applications with this MergeCode are selected by the stored procedure.</td></tr>
<tr><td>Boarder</td><td>Boarding status of the application.</td></tr>
</table>

Grid area fields

Field	Description
Status	Status of the application. See **Status** field above.
Description	Brief description of the status.
Status Count	Total number of students with the same: • enrolment year • campus • year level • gender • status. The count increases each time a student with this status is added to the database.
Places	Number of student places allocated for this gender and status within the year level for a given year. This is based on: • enrolment year • campus • year level • gender • status. This number is specified in the **luFutureYearPlaces** lookup table. See *luFutureYearPlaces lookup table* in the System maintenance manual.
Rank Count	Count of future students with the same: • enrolment year • campus • year level • gender • status.

Buttons

Button	Description
OK	Save the changes made.
OK (Make Default)	Save the changes made and make this application the default. That is, the application you are working towards.
Cancel	Cancel any changes made.

Modifying future student enrolment applications

To modify an existing application of a future student:

1. Open the **Applications** tab in **Future Student Maintenance**. See *Future Student Maintenance - Applications tab* (on page 49).

   The **Applications** tab of the **Future Student Maintenance** window is displayed.

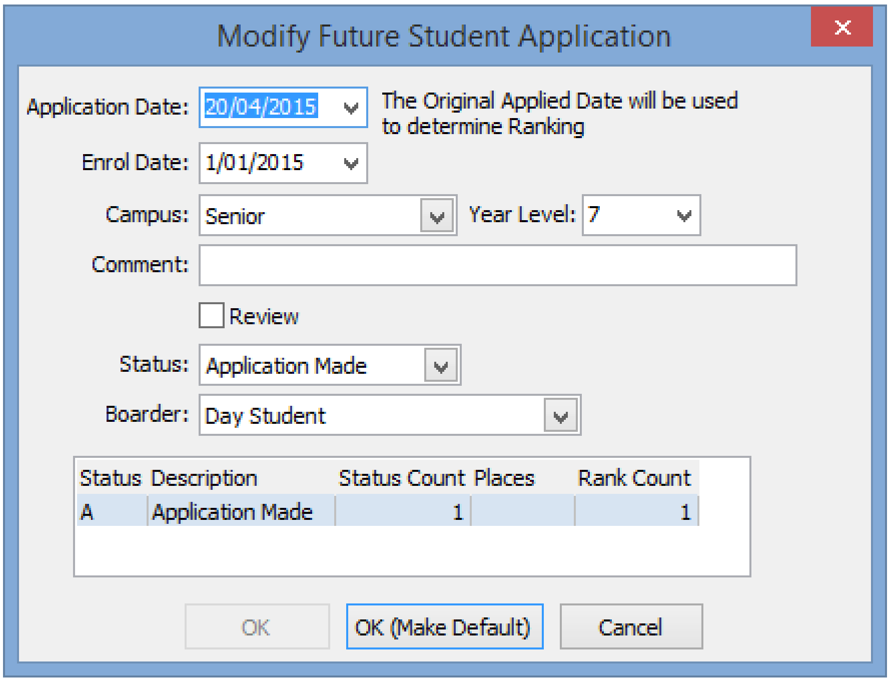
2. Select the application to modify.

3. Click 

.

   The **Modify Future Student Application** window is displayed.

Tip: Double click on the required application to modify it.



Modify Future Student Application window key fields and buttons

Fields

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Category</td><td>The category for the application, if applicable.

Note: This field may not be available at your organisation.</td></tr>
<tr><td>Application Date</td><td>Date of this application or default date.

Note: The original application date is used to determine the ranking of enrolment applications. You can change the ranking. See Future Student Maintenance - Applications tab (on page 49).</td></tr>
<tr><td>Enrol Date</td><td>Date the future student is applying to be enrolled for.</td></tr>
<tr><td>Campus</td><td>Campus the future student is enrolling in, for this application.</td></tr>
<tr><td>Year Level</td><td>Year level the future student is enrolling in, for this application.</td></tr>
<tr><td>Comment</td><td>Any comments about the application.</td></tr>
<tr><td>Review</td><td>Mark the application for further review or follow up.

Tip: When searching for future students, you can display all the applications that require review by selecting Yes in the Marked for Review field. See Searching for future students.</td></tr>
<tr><td>Status</td><td>Status of the future student's application.
The typical default options are:

<table>
<tr><th>Status</th><th>Description</th></tr>
<tr><td>A</td><td>Application made.</td></tr>
<tr><td>D</td><td>Deferred.</td></tr>
<tr><td>F</td><td>Finalised.</td></tr>
<tr><td>O</td><td>Place Offered.</td></tr>
<tr><td>W</td><td>Waitlisted.</td></tr>
<tr><td>X</td><td>Cancelled by the applicant.</td></tr>
</table>

Note: Use the luFutureStatus lookup table to maintain entries. See the luFutureStatus lookup table in the System maintenance manual.

Tip: You can create mail merge letters using the crspFutureStatusChangePrint stored procedure. See Printing mail merge letters using an existing document in the Extracting data manual. The luFutureStatus table is linked to the luFutureStatusMerge lookup table using its MergeCode. When a status is changed, its MergeCode is also changed as well. Any applications with this MergeCode are selected by the stored procedure.</td></tr>
<tr><td>Boarder</td><td>Boarding status of the application.</td></tr>
</table>

Grid area fields

Field	Description
Status	Status of the application. See **Status** field above.
Description	Brief description of the status.
Status Count	Total number of students with the same: • enrolment year • campus • year level • gender • status. The count increases each time a student with this status is added to the database.
Places	Number of student places allocated for this gender and status within the year level for a given year. This is based on: • enrolment year • campus • year level • gender • status. This number is specified in the **luFutureYearPlaces** lookup table. See *luFutureYearPlaces lookup table* in the System maintenance manual.
Rank Count	Count of future students with the same: • enrolment year • campus • year level • gender • status.

Buttons

Button	Description
OK	Save the changes made.
OK (Make Default)	Save the changes made and make this application the default. That is, the application you are working towards.
Cancel	Cancel any changes made.

luYearLevel lookup table

Description

The **luYearLevel** lookup table is used to define:

- if and how to transfer students to the next academic year
- whether to clear or keep certain student data when transferring to the next academic year
- other standard options for each year level, such as the year level coordinators.

Rules for creating new academic years

You must have the next year's campus and year levels defined. When you create the new academic year, the particular year level is 'rolled up' into the next year level (and possibly a different campus).

You must specify the next year level for both boys and girls if your organisation is co-educational. If there is no valid next year level defined, the students are not transferred.

Select the relevant flags to clear the **Form**, **House**, **Tutor Group** and two **Locker** fields, if required.

Examples

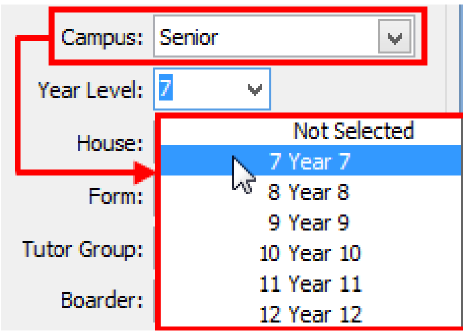
Campus	Code	YearLevelSort	Description	YearLevelCoordinator	NextYearCampusMale	NextYearLevelMale	NextYearCampusFemale
J	0	100	Preparatory		J	1	J
J	1	101	Year 1		J	2	J
J	2	102	Year 2		J	3	J
J	3	103	Year 3		J	4	J
J	4	104	Year 4		J	5	J
J	5	105	Year 5		J	6	J
J	6	106	Year 6		S	7	S
S	7	107	Year 7		S	8	S
S	8	108	Year 8		S	9	S
S	9	109	Year 9		S	10	S
S	10	110	Year 10		S	11	S
S	11	111	Year 11		S	12	S
S	12	112	Year 12		S	13	S
K	40	40	Senior Kindergarten		J	0	J

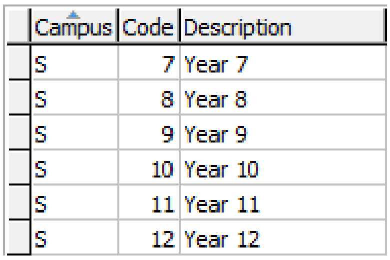
NextYearLevelFemale	TimetableGroup	ClearFormFlag	ClearHouseFlag	ClearTutorFlag	YearsUntilGraduation	CEOLanguagePolicyCode
1	J	☑	☐	☑	12	
2	J	☑	☐	☑	11	
3	J	☑	☐	☑	10	
4	J	☑	☐	☑	9	
5	J	☑	☐	☑	8	
6	J	☑	☐	☑	7	
7	J	☑	☐	☑	6	
8	S	☑	☐	☑	5	
9	S	☑	☐	☑	4	
10	S	☑	☐	☑	3	
11	S	☑	☐	☑	2	
12	S	☑	☐	☑	1	
13	S	☑	☐	☑	0	
0	K	☑	☐	☑	13	

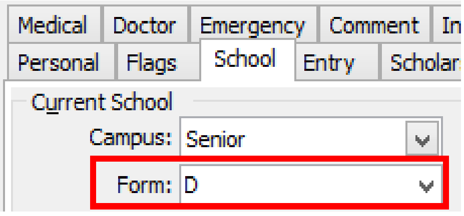
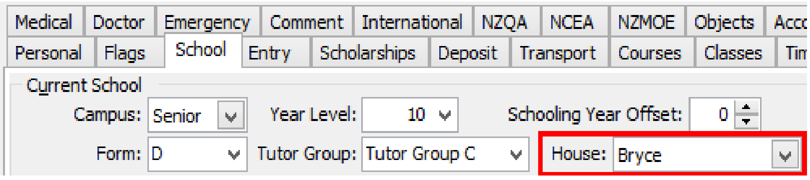
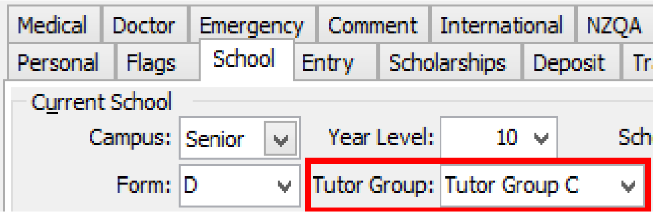
YearLevelGroup	SubSchool	FormFieldName	ExternalSystemCode	ExternalSystemType	ClearLockerBookFlag	ClearLockerOtherFlag	ExportSortKey
		Form			☑	☑	
		Form			☑	☑	
		Form			☑	☑	
		Form			☑	☑	
		Form			☑	☑	
		Form			☑	☑	
		Form			☑	☑	
		Form			☑	☑	
		Form			☑	☑	
		Form			☑	☑	
		Form			☑	☑	
		Form			☑	☑	
		Form			☑	☑	
		Form			☑	☑	

IncludeInCensusFlag	CommPortalPublishFlag	YearLevelCoordID	CommPortalOverrideConfigKey5	MaxStudents	ModifiedDate	ModifiedUser
☑	☑			0		
☑	☑			0		
☑	☑			0		
☑	☑			0		
☑	☑			0		
☑	☑			0		
☑	☑			0		
☑	☑			0		
☑	☑			0		
☑	☑			0		
☑	☑			0		
☑	☑			0		
☑	☑			0		
☑	☑			0		

Fields

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Code</td><td>Numeric code for the year level.</td></tr>
<tr><td>Description</td><td>Description title for the year level-campus combination.</td></tr>
<tr><td>Campus</td><td>Campus code for the year level.
Each campus is defined in the luCampus lookup table.
When creating current students, if you have different year levels at each campus, you can filter the Year Level based on the selected Campus. In the following example, the Senior campus is selected. The Year Level drop-down list only shows year levels that apply to the campus.


This uses the Code and Description fields:
based on the selected Campus
sorted using the YearLevelSort field.

<table><tr><th>Campus</th><th>Code</th><th>Description</th></tr>
<tr><td>S</td><td>7</td><td>Year 7</td></tr>
<tr><td>S</td><td>8</td><td>Year 8</td></tr>
<tr><td>S</td><td>9</td><td>Year 9</td></tr>
<tr><td>S</td><td>10</td><td>Year 10</td></tr>
<tr><td>S</td><td>11</td><td>Year 11</td></tr>
<tr><td>S</td><td>12</td><td>Year 12</td></tr></table></td></tr>
<tr><td>YearLevelSort</td><td>Number used to sort the drop-down list of year levels.</td></tr>
<tr><td>YearLevel-Coordinator</td><td>Name of the coordinator for the year level-campus combination.</td></tr>
<tr><td>NextYear-CampusMale</td><td>Campus to transfer male students to, who are in this year level-campus combination, when creating a new academic year.</td></tr>
<tr><td>NextYear-LevelMale</td><td>Year level to transfer male students to, who are in this year level-campus combination, when creating a new academic year.
Note: Set the value for year 12 students to an invalid year level so that they will not be transferred to the next academic year. For example, 99.</td></tr>
<tr><td>NextYear-CampusFemale</td><td>Campus to transfer female students to, who are in this year level-campus combination, when creating a new academic year.</td></tr>
<tr><td>NextYear-LevelFemale</td><td>Year level to transfer female students to, who are in this year level-campus combination, when creating a new academic year.
Note: Set the value for year 12 students to an invalid year level so that they will not be transferred to the next academic year. For example, 99.</td></tr>
</table>

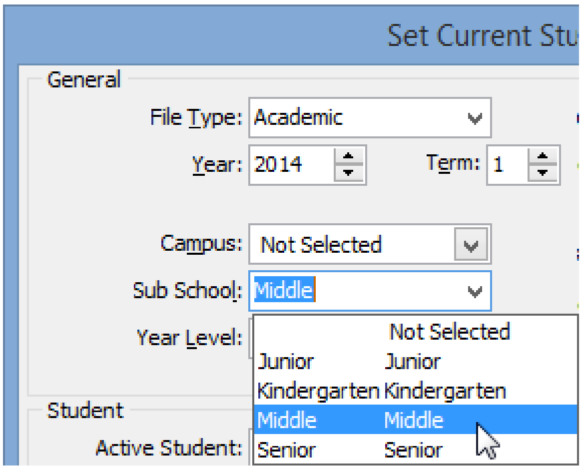
Field	Description
TimetableGroup	Timetable group code for the year level-campus combination. **Note:** You can define timetable groups in the **luTimetableGroup** lookup table. See *luTimetableGroup lookup table* in the System maintenance manual.
ClearFormFlag	Select this field to clear the **Form** field on the **School** tab of students who are transferred when the new academic year is created.  See *Current Student Maintenance - School tab - Status sub-tab* (on page 7) in the Current students manual.
ClearHouseFlag	Select this field to clear the **House** field on the **School** tab of students who are transferred when the new academic year is created.  See *Current Student Maintenance - School tab - Status sub-tab* (on page 7) in the Current students manual.
ClearTutorFlag	Select this field to clear the **Tutor** field on the **School** tab of students who are transferred when the new academic year is created.  See *Current Student Maintenance - School tab - Status sub-tab* (on page 7) in the Current students manual.
YearsUntil-Graduation	Used to determine peer year when transferring current students to past students. For example year 12 students have 0 years until graduation, while year 7 students have 5 years until graduation. **Important Note:** This field must be set consistently across all year levels, or Synergetic's calculation of a student's **Peer Year** may be incorrect.
CEOLanguage-PolicyCode	CEO language policy code for the selected year level. Typical values include: • CL - Compulsory • CLESL - Compulsory (except for ESL students) • O - Optional.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>YearLevelGroup</td><td>
Link the year level to a year level group. These can be used to:

link year levels for custom Crystal Reports
filter whether award points are applied to students based on their year level on the Awards sub-tab of Subject Assessment Maintenance. See Defining criteria and points for an award in the Curriculum manual.

Note: You can define year level groups in the luYearLevelGroup lookup table. See luYearLevelGroup lookup table in the System maintenance manual.
Important Note: This field must be set consistently across all year levels, or Synergetic's calculation of a student's Peer Year may be incorrect.
</td></tr>
<tr><td>SubSchool</td><td>
Sub-school that the year level applies to. This is used mostly by multi-campus organisations that provide schooling for all year levels at each campus.
For example, year levels can be grouped into a:

junior school
middle school
senior school.

<table>
<tr><th>Campus</th><th>Code</th><th>Description</th><th>SubSchool</th></tr>
<tr><td>J</td><td>0</td><td>Preparatory</td><td>Junior</td></tr>
<tr><td>J</td><td>1</td><td>Year 1</td><td>Junior</td></tr>
<tr><td>J</td><td>2</td><td>Year 2</td><td>Junior</td></tr>
<tr><td>J</td><td>3</td><td>Year 3</td><td>Junior</td></tr>
<tr><td>J</td><td>4</td><td>Year 4</td><td>Junior</td></tr>
<tr><td>J</td><td>5</td><td>Year 5</td><td>Junior</td></tr>
<tr><td>J</td><td>6</td><td>Year 6</td><td>Junior</td></tr>
<tr><td>K</td><td>40</td><td>Senior Kindergarten</td><td>Kindergarten</td></tr>
<tr><td>S</td><td>7</td><td>Year 7</td><td>Middle</td></tr>
<tr><td>S</td><td>8</td><td>Year 8</td><td>Middle</td></tr>
<tr><td>S</td><td>9</td><td>Year 9</td><td>Middle</td></tr>
<tr><td>S</td><td>10</td><td>Year 10</td><td>Senior</td></tr>
<tr><td>S</td><td>11</td><td>Year 11</td><td>Senior</td></tr>
<tr><td>S</td><td>12</td><td>Year 12</td><td>Senior</td></tr>
</table>
For example, you can search for current students based on their sub-school.


Note: You can define sub-schools in the luSubSchool lookup table. See luSubSchool lookup table in the System maintenance manual.
</td></tr>
</table>

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>FormFieldName</td><td>The values for the year level as stored as either:
Form and Home Room
TutorGroup.
This is primarily used for exports that require a field called Form. For example if Home Room is stored then that will be exported as Form.</td></tr>
<tr><td>ExternalSystem-Code</td><td>Used to nominate the Normal Year Level that applies to the year level.
Usually this is a one-to-one correspondence.

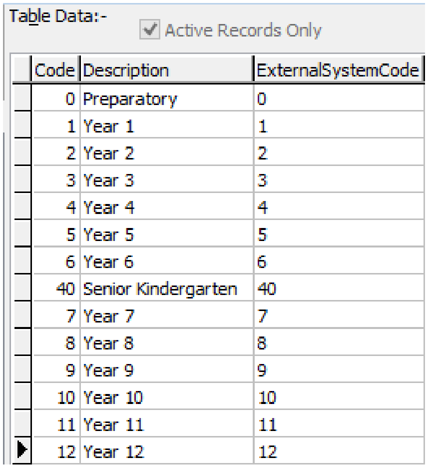
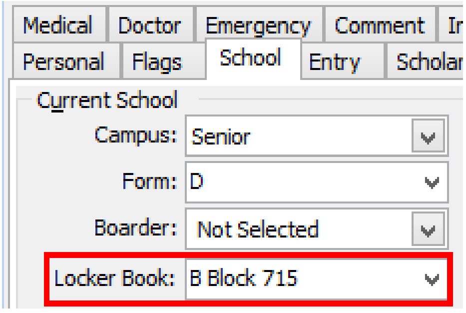
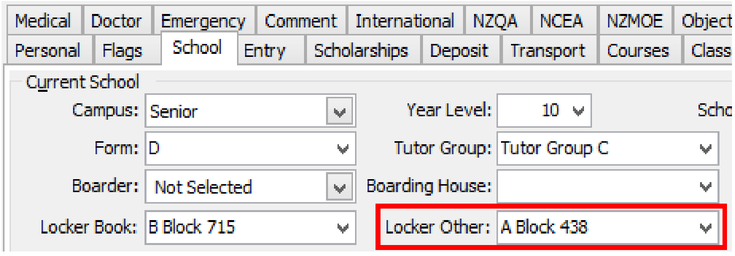



Table Data:- Active Records Only
<table>
<tr><th>Code</th><th>Description</th><th>ExternalSystemCode</th></tr>
<tr><td>0</td><td>Preparatory</td><td>0</td></tr>
<tr><td>1</td><td>Year 1</td><td>1</td></tr>
<tr><td>2</td><td>Year 2</td><td>2</td></tr>
<tr><td>3</td><td>Year 3</td><td>3</td></tr>
<tr><td>4</td><td>Year 4</td><td>4</td></tr>
<tr><td>5</td><td>Year 5</td><td>5</td></tr>
<tr><td>6</td><td>Year 6</td><td>6</td></tr>
<tr><td>40</td><td>Senior Kindergarten</td><td>40</td></tr>
<tr><td>7</td><td>Year 7</td><td>7</td></tr>
<tr><td>8</td><td>Year 8</td><td>8</td></tr>
<tr><td>9</td><td>Year 9</td><td>9</td></tr>
<tr><td>10</td><td>Year 10</td><td>10</td></tr>
<tr><td>11</td><td>Year 11</td><td>11</td></tr>
<tr><td>12</td><td>Year 12</td><td>12</td></tr>
</table></td></tr>
<tr><td>ClearLocker-BookFlag</td><td>Select this field to clear the Locker Book field on the School tab of students who are transferred when the new academic year is created.
Students can be assigned new lockers at the start of the academic year. For example, students may have to transfer to different lockers when they move to a new tutor group based in a different cluster.


See Current Student Maintenance - School tab - Status sub-tab (on page 7) in the Current students manual.</td></tr>
</table>

Field	Description
ClearLocker-OtherFlag	Select this field to clear the **Locker Other** field on the **School** tab of students who are transferred when the new academic year is created. Students can be assigned new **secondary** lockers at the start of the academic year.  See *Current Student Maintenance - School tab - Status sub-tab* (on page 7) in the Current students manual.
ExportSortKey-Group	Used for sorting NCEA exports at New Zealand schools. NCEA is part of the New Zealand National Qualifications Framework. See the *National Certificates of Educational Achievement* (*http://www.nzqa.govt.nz/qualifications-standards/qualifications/ncea/*) web site. Available values are: • **Form** • **House | YearLevel** • **TutorGroup** • **YearLevel | House**.
CommPortal-PublishFlag	All of the year levels you have selected are displayed on the community portal.
YearLevel-CoordID	Synergetic ID of the year level coordinator for the year level-campus combination.
CommPortal-Override-ConfigKey5	Type in a unique value to represent this year level if you want to configure aspects of the Community Portal differently for this year level. You can use the same value for several year levels if you want to configure them as a group in the Community Portal. For example, SEN for the senior year levels.
MaxStudents	Maximum number of students of the specified gender that should exist in this year level. This field is only used for reporting purposes.
EducationType	Type of education for the selected year level. You can select: • Primary • Secondary. **Note:** This field is used to categorise students in the **Student Disability Adjustment** Crystal Report. See *Key current students reports* in the Current students manual.
ModifiedDate	Date and time the lookup table entry was last modified.
ModifiedUser	User that last modified the lookup table entry.

Maintaining student file semesters

Use **Student File Semester Maintenance** to maintain the:

- reporting periods
- description of a reporting period
- tables that are transferred during each reporting period.

Note: File Semester Maintenance may be named differently at your organisation. For example, **File Term Maintenance**.

To change the semester description at your organisation, see *Updating the semester description* (on page 68).

What you can do:

What you can do…	See…
Define the: • number of reporting periods you have in a year • name that the reporting periods are known as at your organisation • term dates, used with assessments and reports functions.	*Student File Semester Maintenance - File Semester tab* (on page 69).
Define which tables are transferred across when you create a new term or semester.	*Student File Semester Maintenance - Next Semester Creation Rules tab* (on page 75).

Updating the semester description

When changing the semester description in Synergetic to either semesters (1-2) or terms (1-4) you need to update:

- fields in **Student File Term Maintenance** window
- reports that have been hard-coded for the term or semester number.

There are no financial impacts in Synergetic when changing the semester description as billing uses different periods, such as a yearly billing run. Alternatively these might also be charged using a billing period.

The Synergetic tables that refer to years and semesters/terms/report periods are:

- **FileYear** - stores the year. For example, 2009, 2010 etc.
- **FileSemester** - stored a number, depending on how many semesters/terms/report periods you have.

How to update the semester description:

To update the semester description:

1. Open the **File Semester** tab of **Student File Semester Maintenance**. See *Student File Semester Maintenance - File Semester tab* (on page 69).
2. Set the **Number of Semesters Per Year** field to:
   - 4 (for terms)
   - 2 (for semesters).
3. Set the **Override Semester Description** to the new semester description. For example:
   - Long: Term, Short: Term (for terms)
   - Long: Semester, Short: Sem (for semesters).
4. Click the **Next Semester Creation Rules** tab and update the rules as they will now need to apply to the new format. For example, to refer to 4 terms rather than 2 semesters.

   Any new rules that you create reflect the new semester/term format.

   Note: After changing the semester definition you can still access the information from prior years though the old selections now reflect the new definitions. For example, if you have changed from two terms a year to four, a selection from **File Year** 2010 semester 2 reflects term 2 under the new system, leaving terms 3 and 4 with empty data.
5. If your organisation uses any Crystal Reports that have been hard-coded or have a selection to show the **FileSemester** or **FileTerm**, update the reports to reflect your changes.

   Tip: In Crystal Reports you can use the field **ActualSemester** instead of **FileSemester** to avoid this problem.
6. If your organisation uses **FileSemester** or **FileTerm** as selection criteria for any Crystal Report that uses both historical and current data, update the report to reflect your changes. For example, a comparison of student results over several years.

Student File Semester Maintenance - File Semester tab

Use the **File Semester** tab to define the:

- number of reporting periods you have in a year
- name that the reporting periods are known as at your organisation
- term dates used with assessments and reports functions.

This task is usually performed when you install and set up Synergetic.

You can also use the **File Semester** tab to override the file semester definitions for specific campuses and year levels.

Reporting period values include:

- term
- half-term
- semester
- report number.

Note: The information in the grid is automatically generated when you create a new term or semester. See *Creating next term details* (on page 83). You can manually add this information in advance if required.

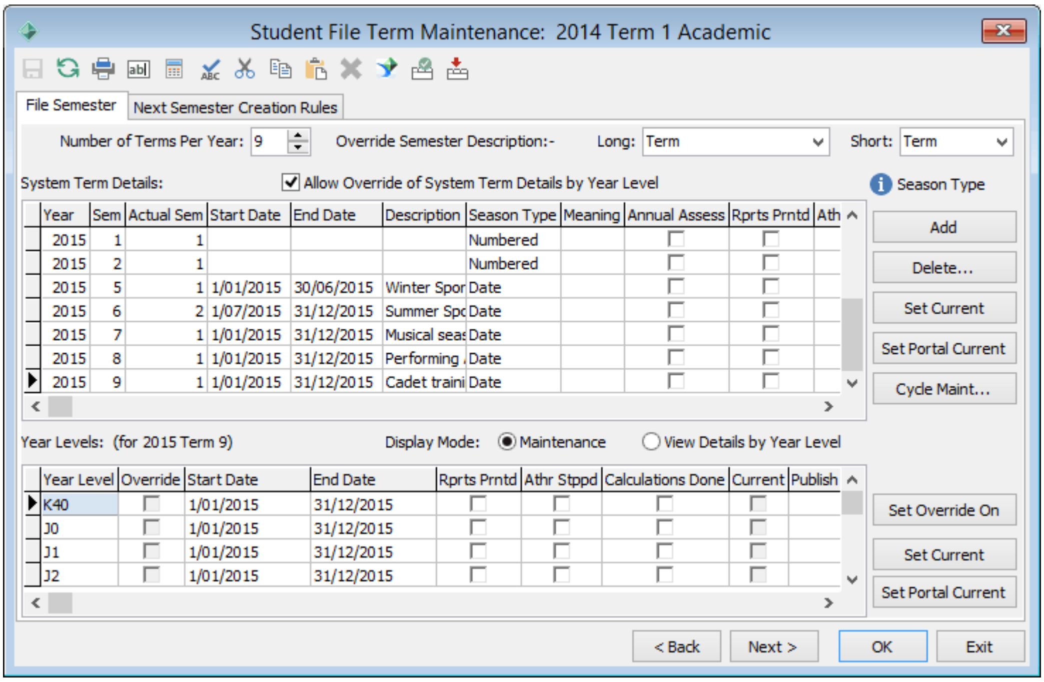
Opening the File Semester tab

To open the **File Semester** tab:

1. Select **Module > Students > File Semester Maintenance** from the main menu.

   The **File Semester** tab of the **Student File Semester Maintenance** window is displayed.

Tip: The **File Semester Maintenance** option may be named differently at your organisation. For example, **File Term Maintenance**.



Student File Semester Maintenance - File Semester tab key fields and buttons

Fields

Field	Description
Number of Terms per Year	Number of reporting periods you want per year.
Override Semester Description: • Long • Short.	Name for your reporting periods. Examples include: • Semester • Term • Report No • Half-term. **Note:** The **Long** and **Short** descriptions are used throughout Synergetic as your reporting period, depending on the circumstances.
Allow Override of System Term Details by Year Level	Select to enable the population of alternate term dates and portal publish dates. **Note:** The **Year levels** area will not be visible until this checkbox is selected.

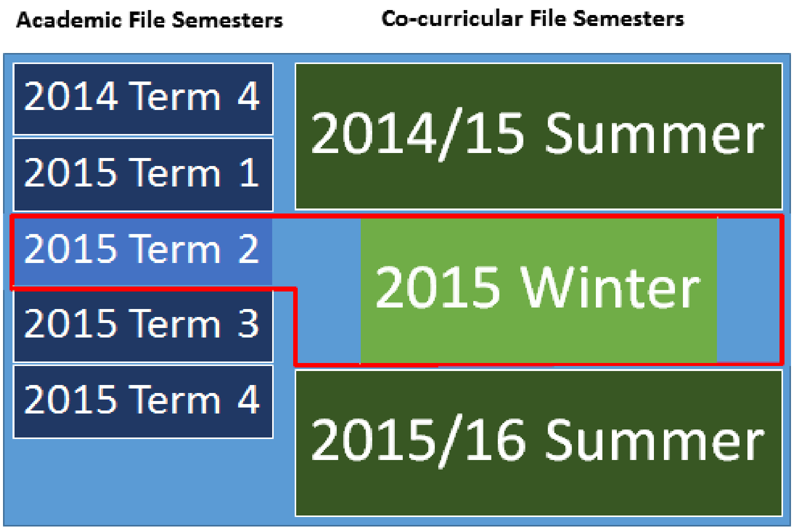
System Semester Details grid area fields

Field	Description
Year	Year that the reporting period applies to.
Sem	Number of the reporting period. Integers are used, with **1** being the first reporting period in the **Year**.
Actual Sem	Actual semester. **Note:** The actual semester may not match the reporting period (which may be known as the term, report number, half-term or semester, depending on your organisation).
Start Date	Date that the semester/term/reporting period starts for the selected year.
End Date	Date that the semester/term/reporting period ends for the selected year. **Note:** Term end dates are used within Synergetic to determine whether a student is attending during the reporting period or perhaps when submitting data to a government agency. This is important if you use assessments and reports functions.
Description	Description of the semester, term or reporting period.

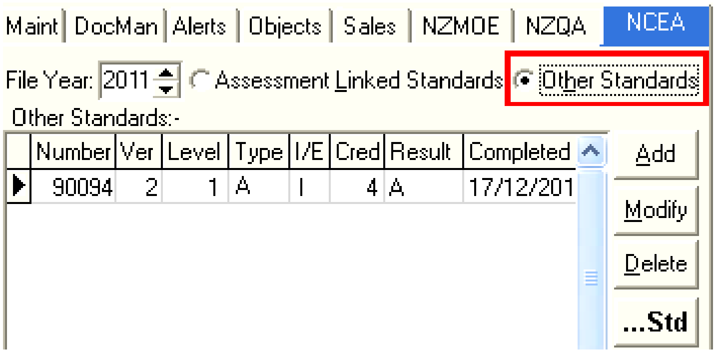
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Season Type</td><td>
Type of season for the selected semester, term, or reporting period. You can select either:

Numbered for terms or semesters based on numbers such as Semester 1.
Date for terms or semesters based on a date range.

Generally, academic terms or semesters use numbered seasons, while co-curricular seasons use date-based seasons.
This is because co-curricular seasons often do not follow typical term or semester dates. For example, in the following configuration the 2015 Winter co-curricular season overlaps multiple academic terms.

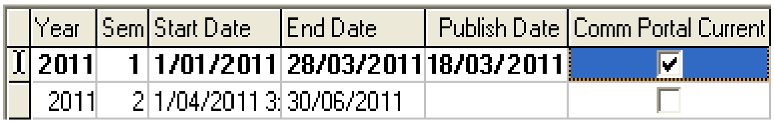


Note: For more information about setting up co-curricular programs, see Setting up co-curricular program data in the SynWeb Co-curriculum manual.
</td></tr>
<tr><td>Meaning</td><td>Displays any Synergy Meaning information attached to the record. See SynergyMeanings in the System maintenance manual.</td></tr>
<tr><td>Annual Assess</td><td>Select this field for the semester or term when the results are submitted; usually term 5.
Note: Commonly used in New Zealand schools to indicate the semester used for NCEA submissions.</td></tr>
</table>

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Rprts Prntd</td><td>
Select once academic reports are printed. Once selected, the student assessment results cannot be edited in Module > Assessments > Student Results Maintenance window.
For New Zealand organisations, clear the Rprts Prntd field for the relevant term or semester to allow modification of the student's assessment standards done at another organisation. The standards are modified on the Other Standards grid on the NCEA tab of Current Student Maintenance.


See Current Student Maintenance - NCEA tab in the Current students manual.
</td></tr>
<tr><td>Athr Stppd</td><td>Select to prevent staff from adjusting or modifying assessment reports. Only staff with 'Editor' permissions can modify reports.</td></tr>
<tr><td>Activated</td><td>
This field displays Yes if the reporting is activated for this semester.
Note: To activate reporting for the semester, run the Create Next Semester Details program. See Creating next term details (on page 83).
</td></tr>
<tr><td>Current</td><td>Displays Yes if you have flagged this as the current term or semester using the Set Current button.</td></tr>
<tr><td>Publish Date</td><td>
Date the result and comments are released on the Community Portal if the Community Portal is configured to use publish dates.
The results are not displayed until:

a date has been entered
the publish date is the same as today's date or later.

</td></tr>
<tr><td>Comm Portal Current</td><td>
Select the reporting period that is to be released to the Community Portal. Only select one reporting period.


If you select a prior reporting period, the:

student results for the prior reporting period are displayed
timetable shown would not be current, as the timetable and other information are shown for the selected file year and semester.

</td></tr>
</table>

Year Levels area fields

Use this area if you wish to define different term dates. If overriding semester details this controls the default year and semester for staff and students in that group.

Note: Results entry now checks **Year Level** information for **Reports printed** and **Author stopped** selections. This allows you to exclude individual year levels from results calculation.

Field	Description
Display Mode	Select to display the **Year Levels** grid in: • **Maintenance** mode to override the reporting period details per year level • **View Details by Year Level** mode to view the reporting period dates and details for each year level.

Year Levels - Maintenance mode grid area unique fields

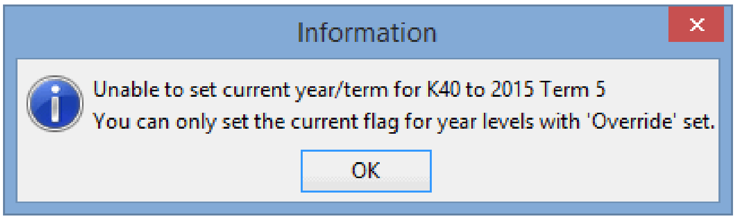
Note: Most of the fields are identical to the **System Semester Details** grid area.

Field	Description
Year Level	The year level the details apply to.
Override	If selected, the reporting period details have been overridden for this year level.
Calculations Done	If selected, the result calculations have been performed for this year level.

Year Levels - View Details by Year Level mode grid area fields

Field	Description
Year Level	The year level the details apply to.
Current Year/Semester	The year and reporting period currently active in Synergetic.
Portal Year/Semester	The year and reporting period currently active in the Community Portal.
Override	If selected, the details have been overridden for this year level.

Buttons

Button	Description
Add	Add a new reporting period.
Delete	Delete the highlighted reporting period. **Note:** You cannot delete a reporting period if it is active or in use.
Set Current	Set the highlighted year and term to be used as the default year and term throughout Synergetic.  **Note:** You will get a message when you next run Synergetic advising that the year and term is different to the default and asking whether you want to update your default setting. You can set the default file year and term by closing all Synergetic programs and selecting **File > Preferences**.
Set Portal Current	Set the selected reporting period to be the default for the Community Portal.
Set Override On	Override the reporting period details for the selected year level.
Cycle Maint...	Launch **Cycle Maintenance** for the selected record to maintain the details of its recurring cycle. See *Maintaining cycles*.

Student File Semester Maintenance - Next Semester Creation Rules tab

Use the **Next Semester Creation Rules** tab to define which tables are transferred across when you create a new term or semester. This task is usually performed when you install and set up Synergetic.

For every reporting period (semester or term) you have at your organisation, you need to identify tables that you want to carry over from the previous reporting period.

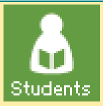
> **Tip:** After you have set up all your rules, print them out or record them as a backup in case the defaults are accidentally loaded.

Defining rules for transferring tables

To set up the rules for transferring tables across when you create new term or semester creation rules:

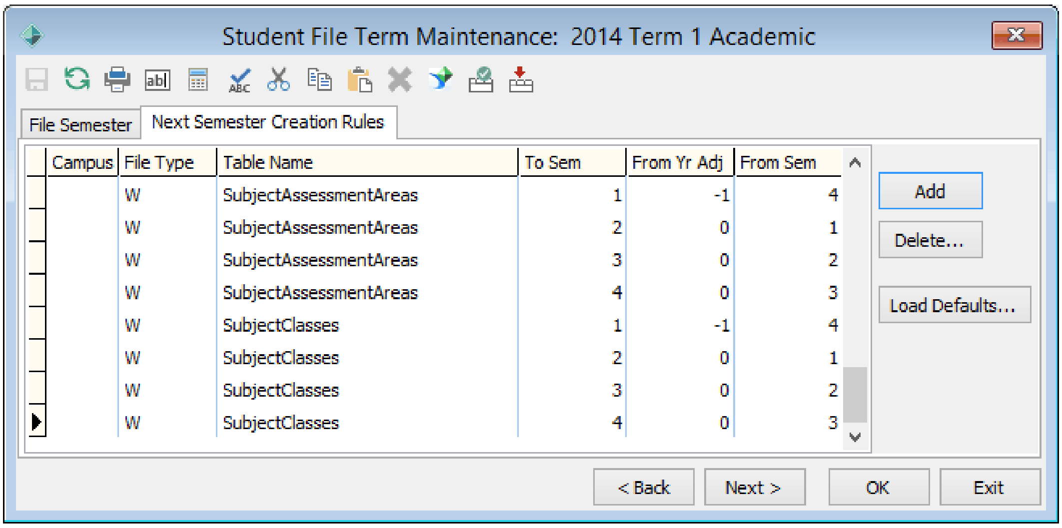
1. Select **Module > Students > File Semester Maintenance** from the main menu.

   The **Student File Semester Maintenance** window is displayed.

   > **Tip:** You can also access the file semester maintenance functions by clicking 
   >

2. Click the **Next Semester Creation Rules** tab.

   The **Next Semester Creation Rules** tab of the **Student File Semester Maintenance** window is displayed.



3. Decide what areas of Synergetic you are using and the tables used in each of these. For example, courses, student classes or timetable definitions. See *Commonly defined table transfer rules* in this topic.

4. Determine the number of entries for each table.

   Note: The number of entries for each campus, file type and table name combination must correspond to the number of reporting periods your organisation is set up for, based on terms or semesters. See *Example of setting up entries* in this topic.

5. Determine the file types that need special treatment. For example, if you are using a timetabling program, consider whether you are going to transfer academic classes.
6. Click Add and type in each of the entries.
7. Click OK.

Example of setting up entries

For each table you want to transfer, you must create one entry for each term or semester.

For example, with the **SubjectClasses** table shown above, if you have four terms, you set up one entry for each term.

Table Name	To Sem	From Yr Adj	From Sem	Result
SubjectClasses	1	-1	1	Previous term 1 classes copied to term 1 in new academic year.
SubjectClasses	2	-1	2	Previous term 2 classes copied to term 2 in new academic year.
SubjectClasses	3	-1	3	Previous term 3 classes copied to term 3 in new academic year.
SubjectClasses	4	-1	4	Previous term 4 classes copied to term 4 in new academic year.

Example of transferring co-curricular classes but not academic classes

The following example highlights how to transfer co-curricular classes but not academic classes from one semester to the next. The is defined for classes linked to file type **M** (music).

You might use this feature if you import your academic classes from a timetabling program but you need your music classes to be copied from term to term within Synergetic.

Table Name	To Sem	From Yr Adj	From Sem	File Type	Result
StudentClasses	1	-1	4	M	Previous term 4 classes copied to term 1 of new Synergetic year.
StudentClasses	2	0	1	M	Term 1 of current year (from **Yr Adj = 0**) copied to term 2 of same year.
StudentClasses	3	0	2	M	Term 2 of current year classes copied to term 3 of same year.
StudentClasses	4	0	3	M	Term 3 of current year classes copied to term 4 of same year.

Commonly defined table transfer rules

Most organisations define the following rules when creating next semester:

Note: All of the tables listed below have different file types within them. For example, academic, music, sports and so on. You should ensure that each file type used at your organisation is covered.

Table	Description	Typical rules
StudentClasses	Which student is doing which class (either academic or co-curricular)?	Usually do not transfer academic classes as these are imported from timetabling program. Transfer other file types to the next period. For example, transfer music or co-curricular file types to the next period.
SubjectClasses	Definitions of the classes. For example, code, description class type and so on.	Transfer all file types to the next period. For example, you might elect to transfer the details of an academic class to **semester 1** from **semester 1** of the previous year.
Subject-Assessments-Areas	Subject assessment rules and assessment areas.	Transfer all file types to the next period. For example, you might elect to transfer the details of an academic class to Sem 1 from Sem 1 of the previous year. Usually only used for academic classes with a file type of **A**.
Staff-Assessment-MarkBook	Staff members' personal mark books for each class that they teach.	Either: • transfer to the next period • do not transfer • transfer from the same period last year, for example **semester 1** to **semester 1**.
Timetable-Definition	Timetable definition rules.	Transfer all file types to the next period.
Timetable	Actual timetable, which is not normally transferred to a new academic year. However, can be from term to term or semester.	If importing from a timetabling program, select courses not transferred. That is, no rules are required.
Courses	Courses defined in **Course Maintenance**, if any.	Not transferred. That is, no rules are required.
StudentCourses	Which student is doing which course, if any.	Not transferred. That is, no rules are required.

Student File Semester Maintenance - Next Semester Creation Rules tab key fields and buttons

Grid area fields

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Campus</td><td>Campus. For example, Junior or Senior.
Note: Leave the Campus field blank to apply the rule to all campuses.</td></tr>
<tr><td>File Type</td><td>Academic or co-curricular classes. For example, A, M, S and so on.
Note: Leave the FileType field blank to apply the rule to all file types.</td></tr>
<tr><td>Table Name</td><td>Name and description of the tables transferred.
<table>
<tr><th>Table</th><th>Description</th></tr>
<tr><td>Courses</td><td>This table contains the list of any external courses you have defined in Course Maintenance.
Note: Most organisations do not use this table.</td></tr>
<tr><td>StaffAssessmentMarkBook</td><td>This table contains the staff member's personal mark book for each class that they teach. This is maintained in Staff Maintenance and in Student Results Maintenance.</td></tr>
<tr><td>StudentAssessmentPrintFlags</td><td>This table contains details of the print flags for student assessments. This is maintained in Student Results Maintenance.</td></tr>
<tr><td>StudentClasses</td><td>This table contains details of the students enrolled in each class. This is maintained in:
Current Student Maintenance - Classes tab (on page 91) in the Current students manual
Class Maintenance - Students tab in the Assessments and reports manual.
A class can be an academic class or a co-curricular class.</td></tr>
<tr><td>StudentCourses</td><td>This table contains details of the students enrolled in external courses. This is maintained on the Courses tab of Student Maintenance.
Note: Most organisations do not use this.</td></tr>
<tr><td>SubjectAssessmentAreas</td><td>This table contains the assessment rules for the assessable areas. This is maintained in Subject Assessment Maintenance.</td></tr>
<tr><td>SubjectClassDefaultPrintFlags</td><td>This table contains details of the print flags for subject classes. This is maintained in Subject Assessment Maintenance.</td></tr>
</table></td></tr>
</table>

Field	Description	
	SubjectClasses	This table contains the definitions of classes. The description is linked to an assessment code, then linked to a learning area. This is maintained in **Class Maintenance**.
	Timetable	This table contains the actual timetable, including period, times and days. **Note:** Most organisations import their timetable from specialised timetabling software packages.
	SubjectClassResultGroups	This table contains result groups for assessment areas. This is maintained in **Subject Assessment Maintenance**.
	TimetableDefinition	This table contains the timetable definition rules, including class, day and period. These are maintained on the **Timetable Definition** tab of **Timetable Maintenance**.
To Sem	Reporting period the files are being transferred to.	
From Yr Adj	Year the files are being transferred from. **Note:** If the **From Yr Adj** is **0**, it denotes the current year and if the **From Yr Adj** is **-1**, it denotes the previous year.	
From Sem	Reporting period the files are being transferred from. **Note:** If the **From Sem** value is **0**, it denotes that it is not to be copied. You can delete the entry; however there can be circumstances where you want to keep the information even though you are not transferring anything. For example, you could use this if you want to import academic classes from the timetabling program but transfer co-curricular classes from one semester to the next.	

Buttons

Button	Description
Add	Add new transfer rule.
Delete	Delete the highlighted transfer rule.
Load Defaults...	Load the default rules for creating the next semester. **Tip:** After you have set up all your rules, print them out or record them as a backup in case the defaults are accidentally loaded. To record the details in Microsoft Excel, right click in the grid and select **Copy Grid Contents to Excel**. Also, if you have access to MSQuery, you can print the data from the **FileSemesterNextRules** table in the Synergetic database.

Finalising terms

When the student reports have been printed, you can finalise the term by:

- marking the selected year and term as having had student reports printed
- deleting any unused result and comment records
- deleting any backed up results from the selected term and any prior terms.

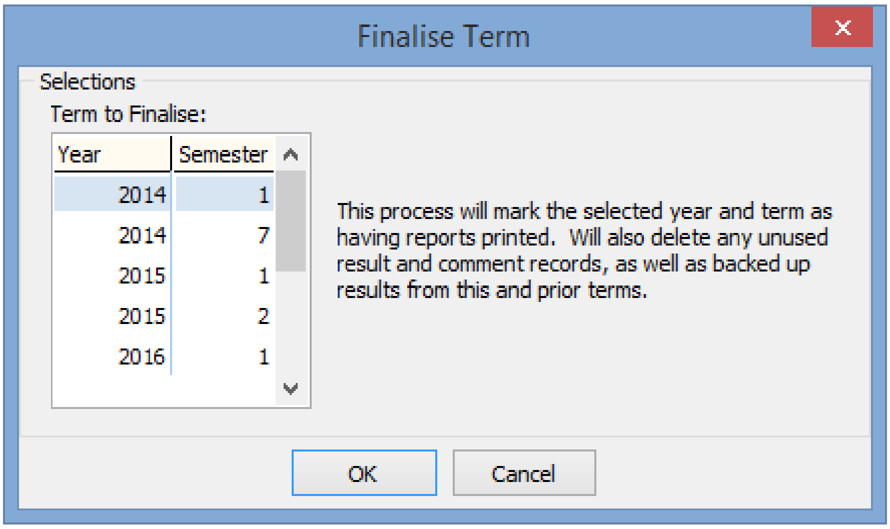
Note: The words semester, term and reporting period are used interchangeably.

Note: Synergetic archives each change to student results throughout the reporting period. It is important to run the **Finalise Term** program at the end of each reporting period to clear these archives and improve performance.

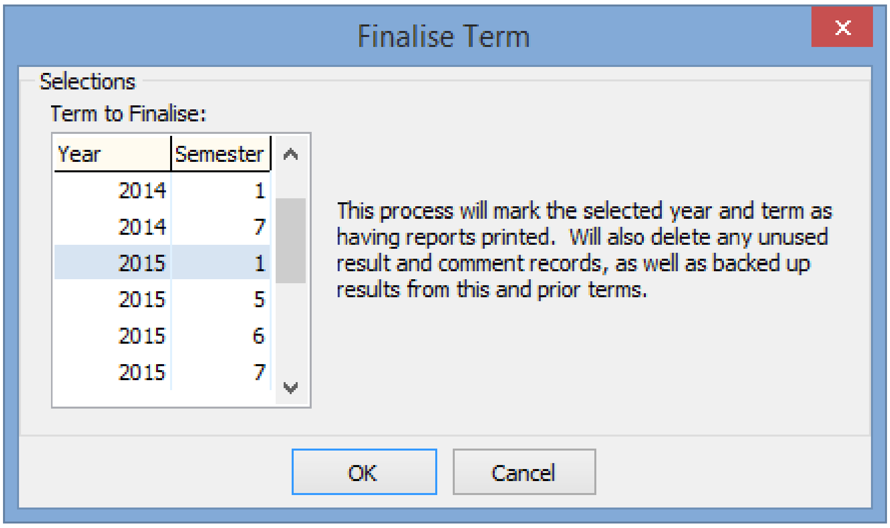
To finalise the term:

1. Select **Module > Students > Finalise Term...**. from the main menu.

   The **Finalise Term** window is displayed.

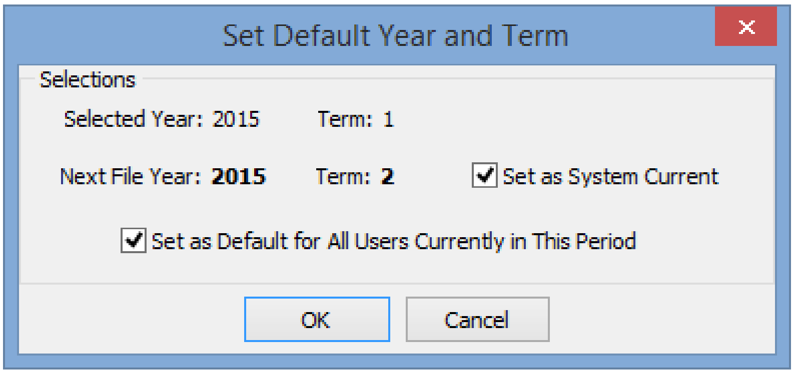


2. Scroll down to the year and semester to process.



3. Click OK.

The **Set Default Year and Term** window is displayed.

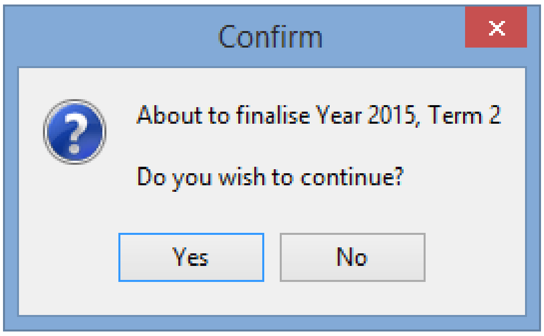


4. Clear the **Set as System Current** field if you do **not** want the next term set as the current default.
5. Clear the **Set as Default for All Users Currently in This Period** field if you do **not** want to update the default year and term of all users.

Note: If this remains selected, users can still override the year and term they are processing.

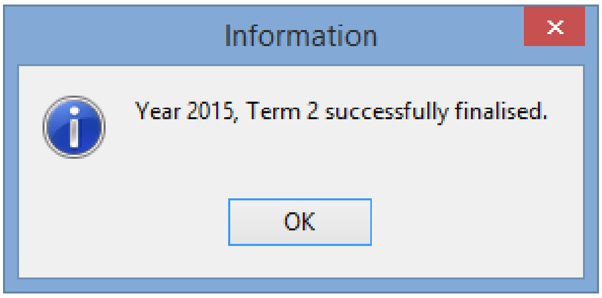
6. Click OK.

The following dialog window is displayed.



7. Click Yes.

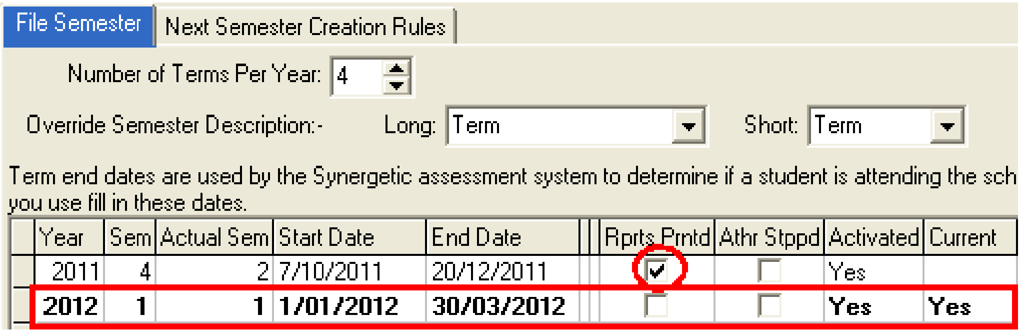
The following dialog window is displayed.



8. Click 

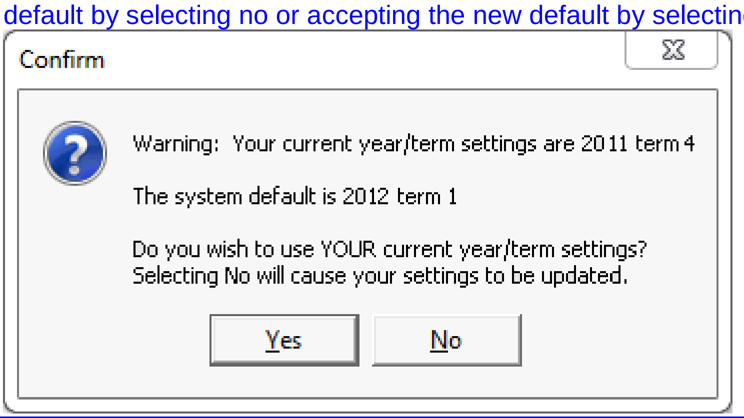
.

The **Rprts Printed** field on the **File Semester** tab is now selected for the finalised term, and the next term is now activated and made current on the **File Semester** tab of **Student File Semester Maintenance**.



See *Student File Semester Maintenance - File Semester tab* (on page 69) in the Curriculum or Next year process manual.

Note: The following confirmation dialog is displayed when users at your organisation log in, if they have been overriding the default year and term. They have the option of continuing to override the default by selecting no or accepting the new default by selecting yes.



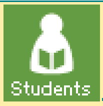
Creating next term details

Use the **Create Next Term Details** window when creating a new term for the new academic year.

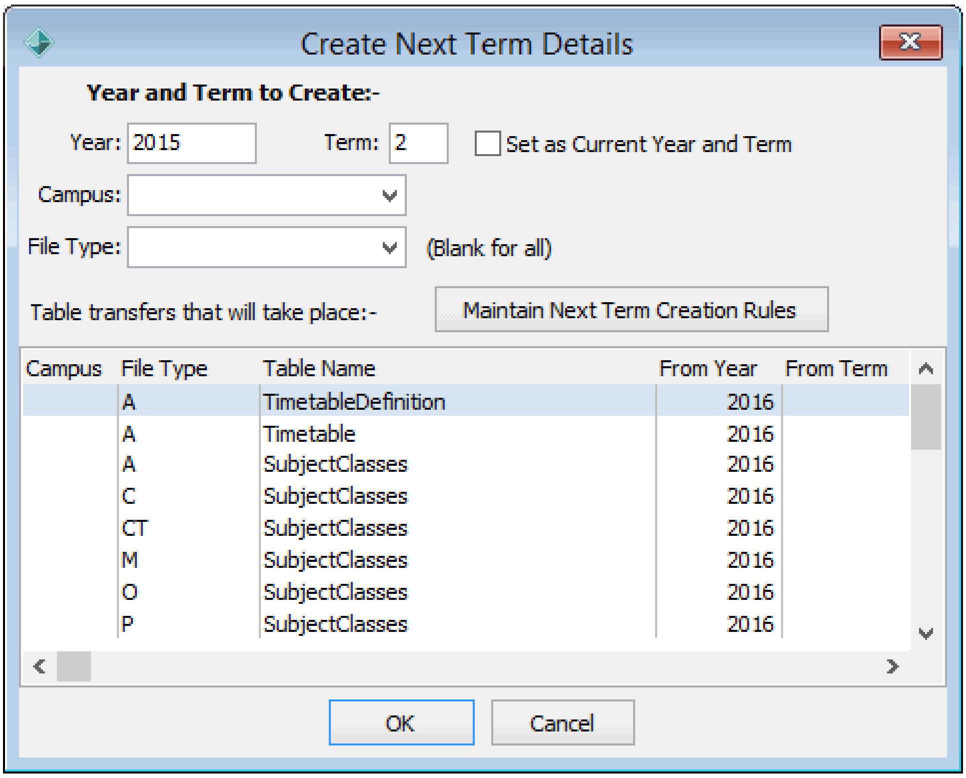
Note: In this section, the words semester, term and reporting period are used interchangeably.

To create a new term:

1. Select **Module > Students > Create Next Term Details...** from the main menu.

Tip: You can also access the term details functions by clicking .

The **Create Next Term Details** window is displayed.



2. Enter the year and term you want to create. For example Year **2015**, Term **2**.

Note: If the **Create Next Term Details** process has already been run for one or more campuses at your organisation, Synergetic may offer to create another term. Check the term number before proceeding and change back to the correct term if necessary.

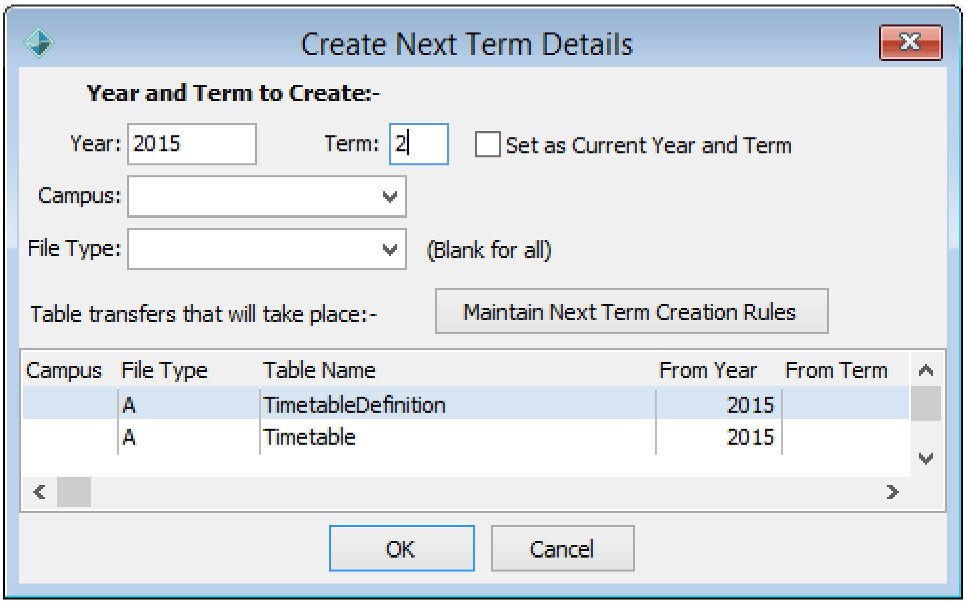
3. If required, set the year and term as the current year and term.

Note: If you are doing this before the end of the academic year, you may want to leave this field cleared.

4. If required, select the campus to create the year and term for.

5. If you are creating the semester for a specific academic or co-curricular class, select an individual file type.

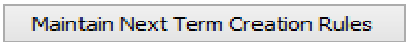
   The rules for the selected file type are displayed.



Tip: It is possible to **only** transfer students into the new term if you use a special file type. That is, a file type that was created that does not have any next term creation rules defined.

Note: If you have multiple rules for the same table with different campuses, the **Create Next Term Details** process will not work with a blank **Campus** field.

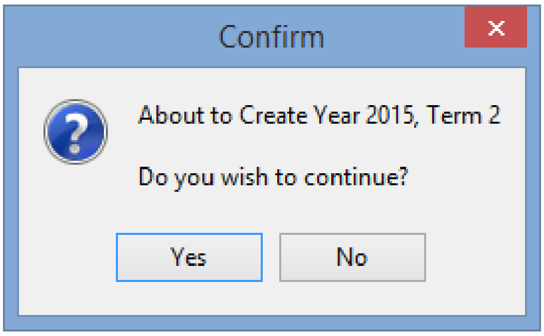
6. Check the tables and the year/semester they are being transferred from. If:

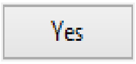
   - incorrect, click 

   - correct, click 

.

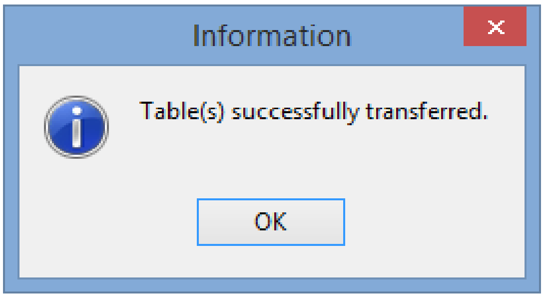
     The following message is displayed.



7. Click 

.

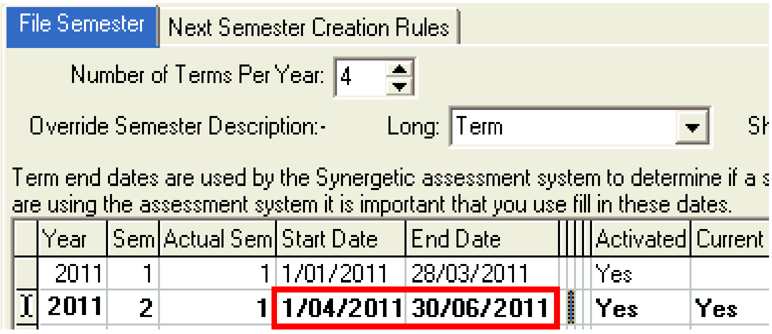
   The new term is created, and the next year and term is made the default at your organisation, if selected earlier. The following message is displayed.



8. Click 

.

   If you are using the Synergetic Assessments module, enter the **Start Date** and the **End Date** of the reporting period on the **File Semester** tab of **Student File Semester Maintenance**. See *Student File Semester Maintenance - File Semester tab (on page 69).*



Create Next Term Details window key fields and buttons

Fields

Field	Description
Year	Year to create the term for.
Term	Term to create. **Note**: Check the term number that is presented carefully before proceeding.
Set as Current Year and Term	Select to update the default file year and term. You are asked if you want to update your individual default to match the system default. You can set the default file year and term by closing all Synergetic programs and selecting **File > Preferences**. **Note:** If you want to stay in the current period, do not select **Set as Current Year and Term**.
Campus	Campus to create the term for. **Note**: Leaving the **Campus** field blank will not process rules which are associated with a particular campus.
File Type	Type of file to transfer to the new term. For example, Academic or Co-curricular. **Note:** Only selected file types are transferred. Leave the **File Type** field blank to transfer all file types for the selected campus.

Buttons

Button	Description
Maintain Next Term Creation Rules	Maintain the rules for creating next term using **Student File Semester Maintenance**. See *Student File Semester Maintenance - Next Semester Creation Rules tab* (on page 75).

Adding debtors in bulk

Use this program to create debtor constituencies for the primary contact for all current students, if they are not already a debtor.

After running the program you can access all current student debtors through **Debtor Maintenance**. See *Maintaining debtors* in the Debtors manual.

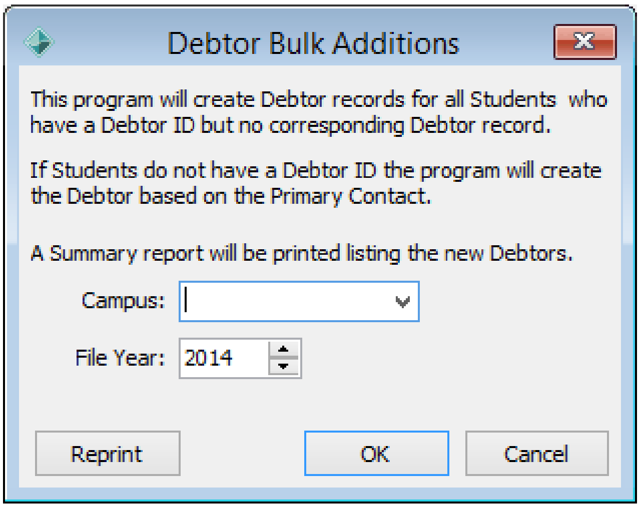
Note: Inactive debtors that have been reinstated are included in the **Debtor Bulk Addition Summary** report.

Opening the Debtor Bulk Additions window

To open the **Debtor Bulk Additions** window:

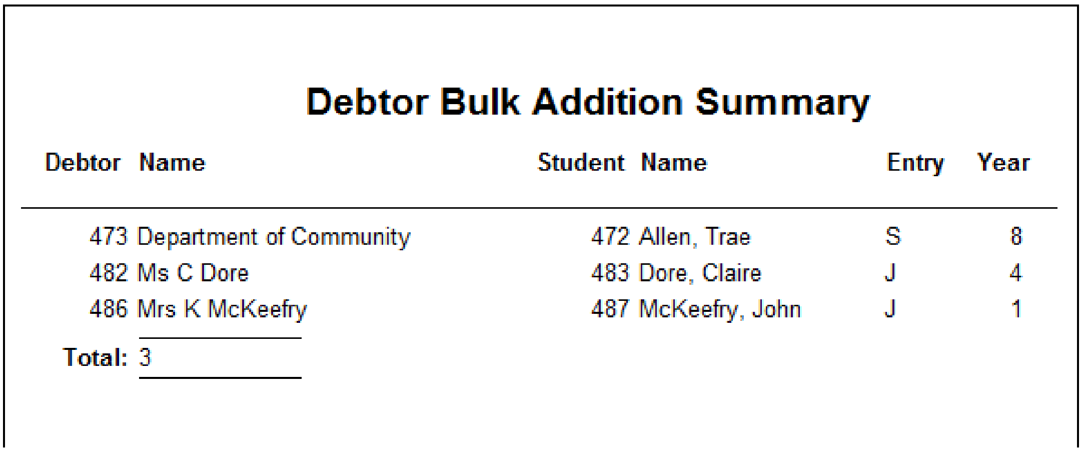
1. Select **Module > Debtors > Debtor Bulk Additions** from the main menu.

   The **Debtor Bulk Additions** window is displayed.



Note: Future student's debtors will not be automatically created.

After running the program, you receive a summary report of all of the debtors that have been created. It shows debtor ID, debtor name, student ID, student name, entry campus and entry year level.



Debtor Bulk Addition Summary

Debtor	Name	Student	Name	Entry	Year
473	Department of Community	472	Allen, Trae	S	8
482	Ms C Dore	483	Dore, Claire	J	4
486	Mrs K McKeefry	487	McKeefry, John	J	1

Total: 3

Handling exceptions after the next year has been created

Create the new academic year as late as possible so that you can include the following student types in the process:

- leaving current students
- current students who have left
- repeating current students
- new current students or late enrolments
- confirmed future students who cancel
- confirmed future students who defer.

However, if the new academic year has been created, you need to individually process them according to their type:

- Leaving current students. See *Processing a student leaving after the new year has been created* (on page 89).
- Current students who have left. See *Processing a student leaving after the new year has been created* (on page 89).
- Repeating current students. See *Processing a repeating student after the new year has been created* (on page 97).
- New current students or late enrolments. See *Adding a new student in the current year after the new year has been created* (on page 100).
- Confirmed future students who cancel after transferring into next year's current students. See *Removing a confirmed future student who cancels after the new year is created* (on page 102).
- Confirmed future students who defer after transferring into next year's current students. See *Removing a confirmed future student who defers after the new year has been created* (on page 105).

Processing a student leaving after the new year has been created

If a student leaves or is leaving after you have created the new academic year, you need to:

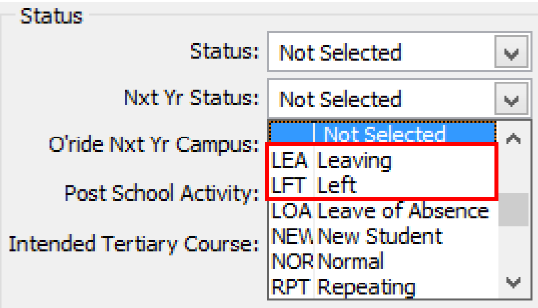
- update their status in the current academic year
- remove them from the new academic year manually.

Note: If you delete a student from the current year or transfer them to past students, they are not automatically deleted from the next academic year.

Note: Current year refers to the year that is ending. For example, if today's date is 20th November 2016, then the current year is 2016.
Next year refers to the new year. For example, if today's date is 20th November 2016, then the next year is 2017.

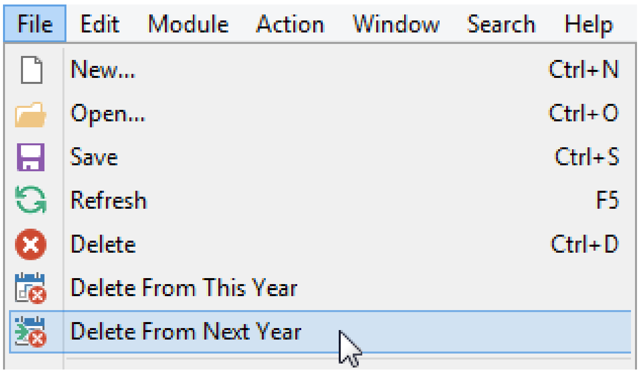
To update a student's status and remove them from next year:

1. Search for the student in **Current Student Maintenance** in the **current** year.
2. Click the **School** tab. See *Current Student Maintenance - School tab - Status sub-tab* (on page 7) in the Curriculum or Next year process manual.
3. Select **Left** or **Leaving** from the **Status** drop-down list.
4. Type or select the **Leaving Date**.
5. Select the reason for leaving from the **Reason** drop-down list.
6. Select **Left** or **Leaving** from the **Nxt Yr Status** drop-down list.

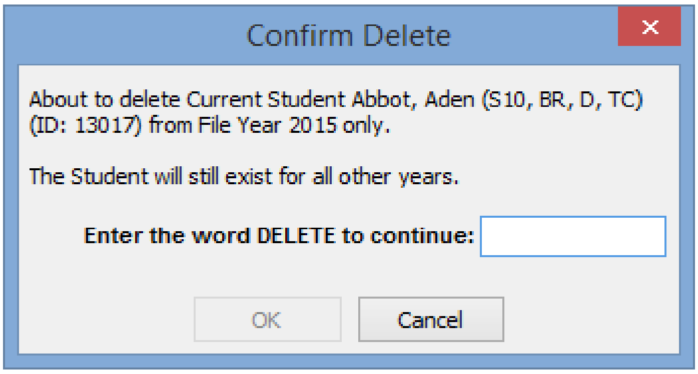


7. Click . The student's status has been updated for the current year.

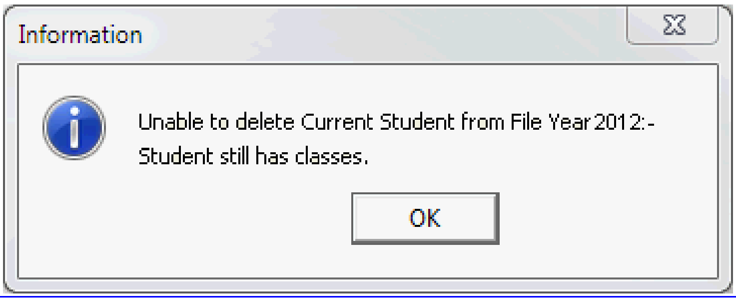
8. Select **File > Delete From Next Year** from the main menu.



The **Confirm Delete** window is displayed.



Note: If the following message is displayed, change to next year and delete the student's classes on the **Classes** tab. See *Current Student Maintenance - Classes tab* (on page 91) in the Current students manual.



9. Type **delete**.

10. Click .

Current Student Maintenance - Classes tab

Use the **Classes** tab to maintain academic and co-curricular classes the student is enrolled in at your organisation.

For academic classes, either:

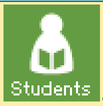
- import this information through the timetable import program
- use **Class Maintenance** to add, view and edit class information.

Opening the Classes tab

To open the **Classes** tab:

1. Select **Module > Students > Current Student Maintenance** from the main menu.

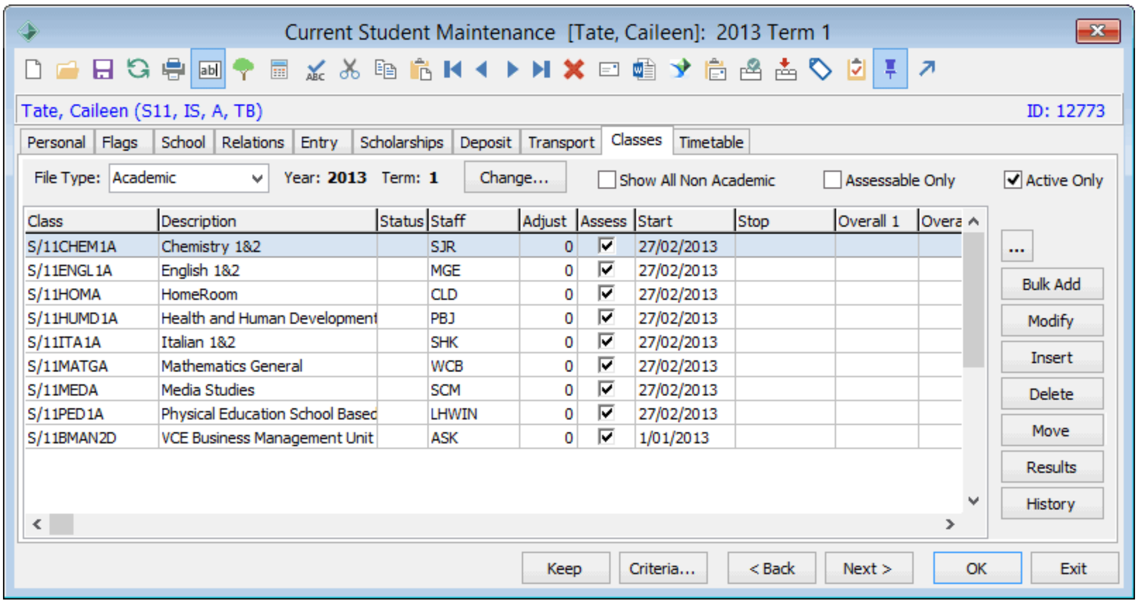
   The **Set Current Student Search Criteria** window is displayed.

   Tip: You can also access the current student functions by clicking 

   .

2. Search for the student. See *Searching for existing students* in the Current students manual.
3. Click the **Classes** tab.

   The **Classes** tab of the **Current Student Maintenance** window is displayed.



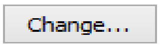
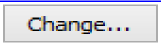
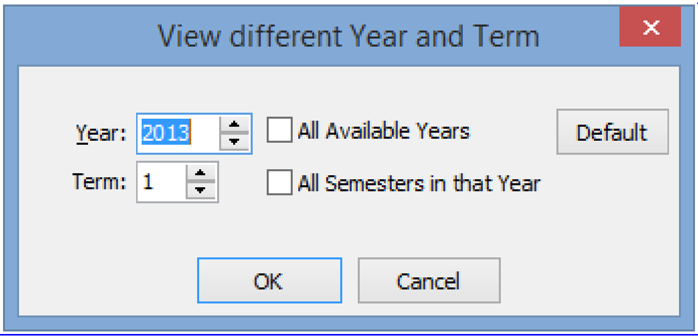
Current Student Maintenance - Classes tab key fields and buttons

Fields

Field	Description
File Type	Type of class. For example: • academic classes • music classes • sport • and so on. **Tip:** Set the **File Type** to blank to show all types of classes for the student.

Field	Description
Year / Term	Year and term when the student attended the class.
Show All Non Academic	Select to display all non-academic classes for the selected period. **Note:** This displays all file types except **A.**
Assessable Only	Select to only display classes with an **Assessable** flag set.
Active Only	Select to only display classes that the student is enrolled in at the current date, using the start and stop dates against a student's class.

Buttons

Button	Description
	View a different year and term. **Note:** When you click , the following window is displayed. You can either select the year and term, select **All Available Years**, select **All Terms in that Year** or click **Default** to view the default year and term.  **Note:** Different organisations may have terms, semesters or other cycles.

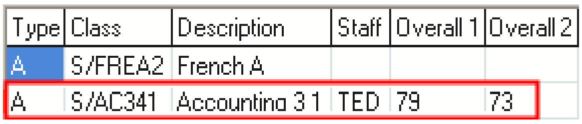
Grid area fields and buttons

Field	Description
Seq	Order that the classes are displayed in. Classes with smaller numbers are displayed higher in the list. **Note:** This column is only displayed if you click Move.
Class	Class code.
Description	Class description. **Note:** The description is obtained automatically from the **Class Maintenance** module.
Status	Whether the student has completed the requirements for the class. **Note:** This field is normally used for external study or co-curricular classes. It can also be used for charging purposes. See *Making adjustments for students not attending classes* in the Debtors manual.
Staff	Staff code for the staff member taking the class.
Adjust	Any adjustments made to the number of class sessions being undertaken. For example, make a negative adjustment for a co-curricular class to give the student a refund for missed classes. See *Making adjustments for students not attending classes* in the Debtors manual.
Assess	Select if the class is assessable.
Start	Date the student commenced the class. **Note:** In the full version of Synergetic, you can maintain class start and stop dates using the timetable import function or change an entry from the **Classes** tab.
Stop	Date the student withdrew, if applicable. **Note:** In the full version of Synergetic, you can maintain class start and stop dates using the timetable import function or change an entry from the **Classes** tab.

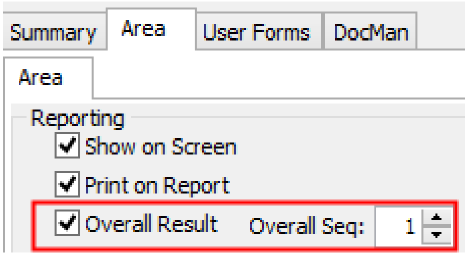
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Overall 1 /
Overall 2</td><td>
Calculated (special) fields that show the result of the assessment areas that are designated as:

- **Overall Seq** is equal to **1** on the assessment area
- **Overall Seq** is equal to **2** on the assessment area, respectively.

In the following example, the overall results for the **S/AC341** accounting class are shown for the student.

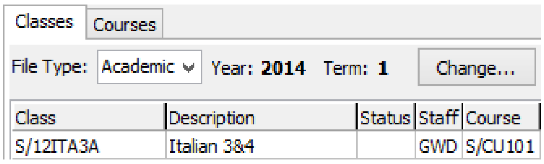


The **Overall Seq** field is maintained on the **Area** sub-tab of **Subject Assessment Maintenance**. See *Subject Assessment Maintenance - Area tab - Area sub-tab* in the **Synergetic** Assessments and reports manual.

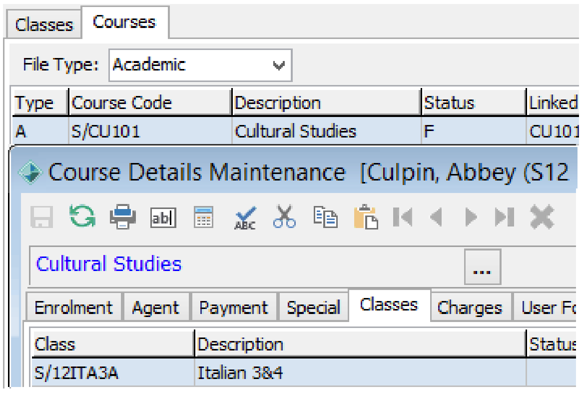


</td></tr>
<tr><td>Course</td><td>
Course that the class is linked to, if the student is taking a course with one or more classes set up against it.

In the following example, course **S/CU101** (**Cultural Studies**) has several classes set up against it.



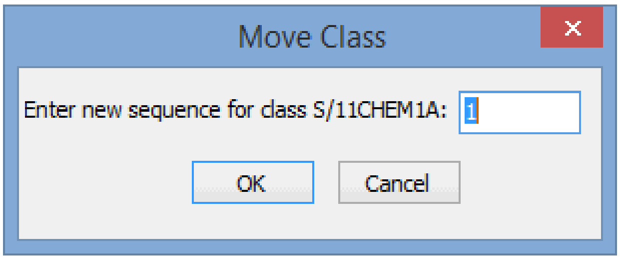
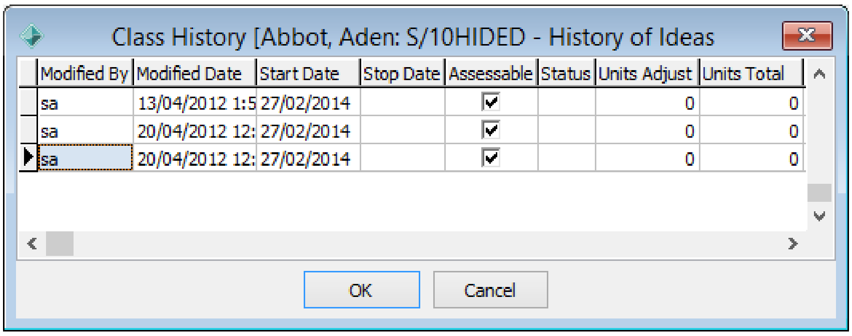
These are maintained on the **Classes** tab of **Course Details Maintenance** window for the student. See *Course Details Maintenance - Classes tab*.



Tip: Select the course and click Details... on the **Courses** tab to open the **Course Details Maintenance** window.
</td></tr>
</table>

Field	Description
PTI Request	Description of the parent teacher interview request status. **Note:** This field is not editable. The value of this field can be maintained using the Modify Student Class Details accessed by clicking Modify.

Buttons

Button	Description
...	Launch the **Class Maintenance** window for the selected class. You can view or update teacher, student or timetable details for the class. This is useful for viewing a list of students in the class. See *Maintaining classes* in the Assessments and reports manual.
Bulk Add	Add one or more classes to the student's list. The new classes are appended to the end of the list. See *Adding student classes in bulk*. **Tip:** You can also use the **Insert** button to add classes to a student's list.
Modify	Modify the student's class details for the selected class. See *Modifying student class details*. **Tip:** You can also double click the selected class to modify the details.
Insert	Insert a class before the highlighted class, by selecting from the list of classes available. **Tip:** Use this function to insert new classes where the sequence is relevant. You can also use **Bulk Add** to add new classes to a student's list.
Delete	Delete the student from the selected class.
Move	Move the class to a different position in the sequence of classes for the student, by specifying a new sequence number. 
Results	View or maintain student results for the assessable class selected. See *Maintaining student results* in the Assessments and reports manual.
History	Launch the **Class History** window to view past modifications made to the student's class details for the selected class. 

Processing a repeating student after the new year has been created

All students who are remaining at your organisation are automatically copied into the new academic year. If you are advised that a student is repeating a year after the new academic year has been created, you need to set their:

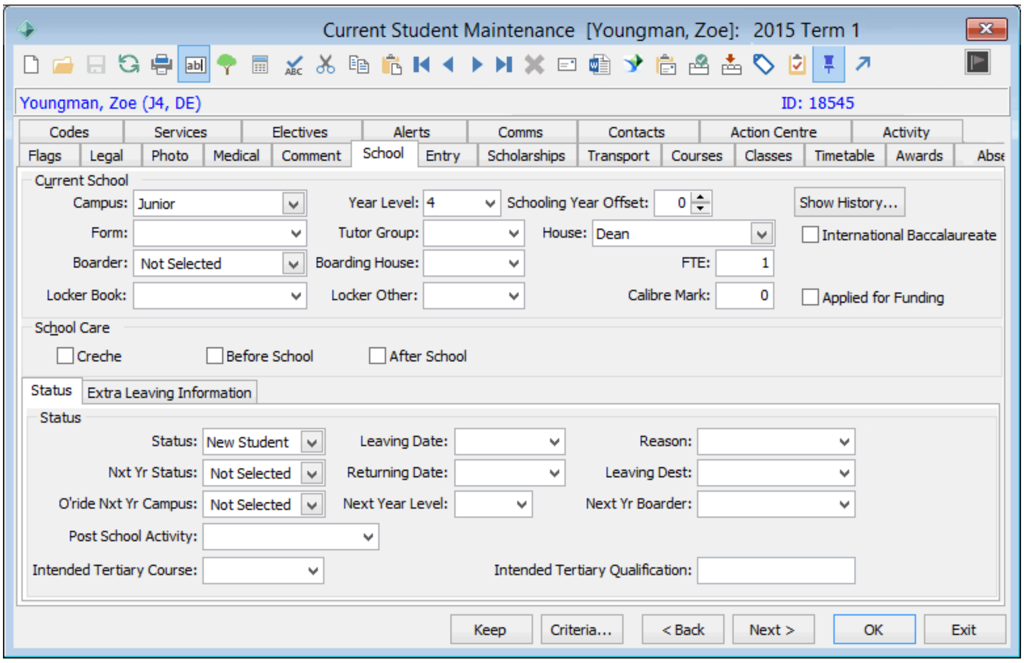
- next year status to **Repeating** in the current year
- status to **Repeating** in the next year
- year level and campus in the next year, as they have been advanced to the next year level and their campus may have been updated.

Note: Current year refers to the year that is ending. For example, if today's date is 20th November 2016, then the current year is 2016.
Next year refers to the new year. For example, if today's date is 20th November 2016, then the next year is 2017.

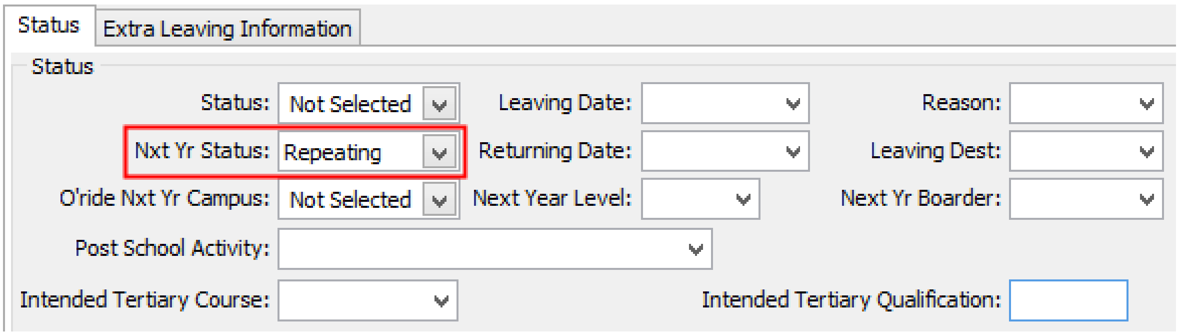
To update the values for a repeating student:

1. Search for the student in **Current Student Maintenance** in the **current** year.
2. Click the **School** tab. See *Current Student Maintenance - School tab - Status sub-tab* (on page 7) in the Curriculum or Next year process manual.

   The **School** tab of the **Current Student Maintenance** window is displayed.



3. Select **Repeating** from the **Nxt Yr Status** drop-down list.

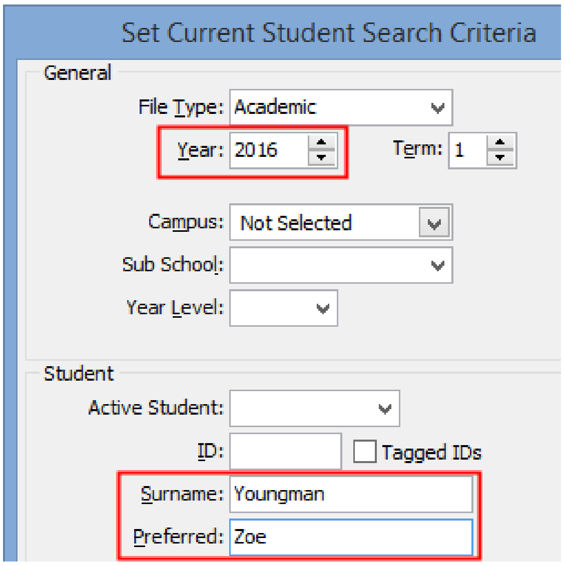


4. Click .

5. Click Change… .

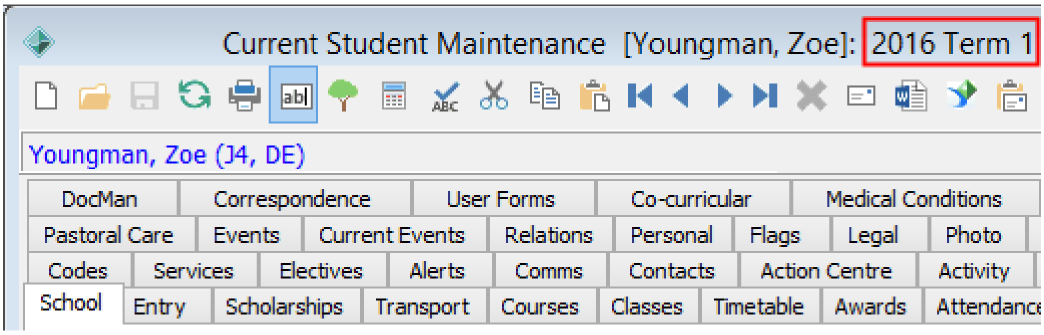
   The **Set Current Student Search Criteria** window is displayed.

6. Update the **Year** to next year.
7. Update the selection criteria to search for the student in the new academic year.



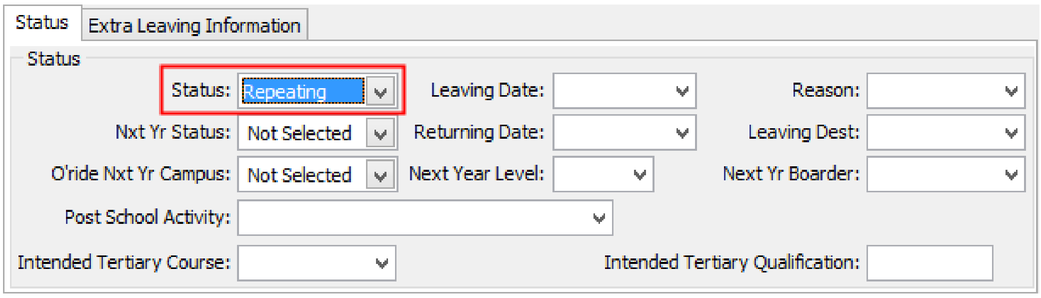
8. Click OK .

   The **School** tab of the **Current Student Maintenance** window is displayed for the student in the **next** academic year.

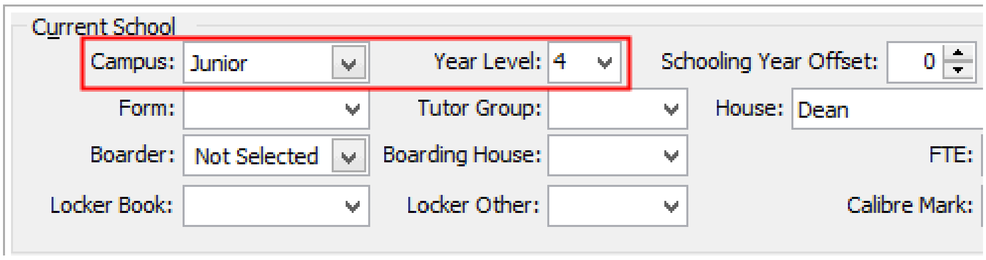


Note: Check the file year at the top of the **Current Student Maintenance** window is correct.

9. Select **Repeating** from the **Status** drop-down list.



10. Change the **Year Level** and **Campus** to the year level and campus the student is repeating.



11. Click .

Adding a new student in the current year after the new year has been created

If a student enrols at your organisation in the current year after you have created the new academic year, you need to create a:

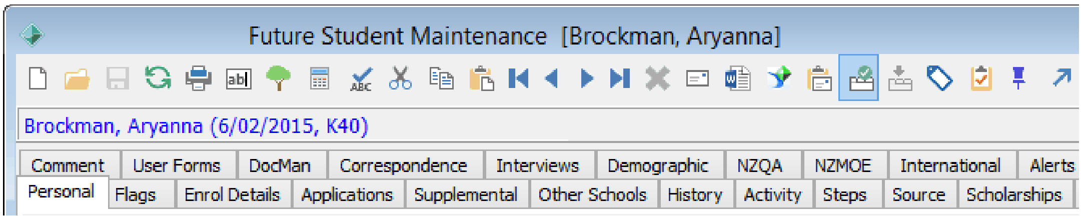
- Current student record in the current period.
- Create a new academic year again to add them to the new year. Synergetic adds any new records and removes any records that you have deleted in the current year.

Note: Current year refers to the year that is ending. For example, if today's date is 20th November 2016, then the current year is 2016.
Next year refers to the new year. For example, if today's date is 20th November 2016, then the next year is 2017.

To add a new student:

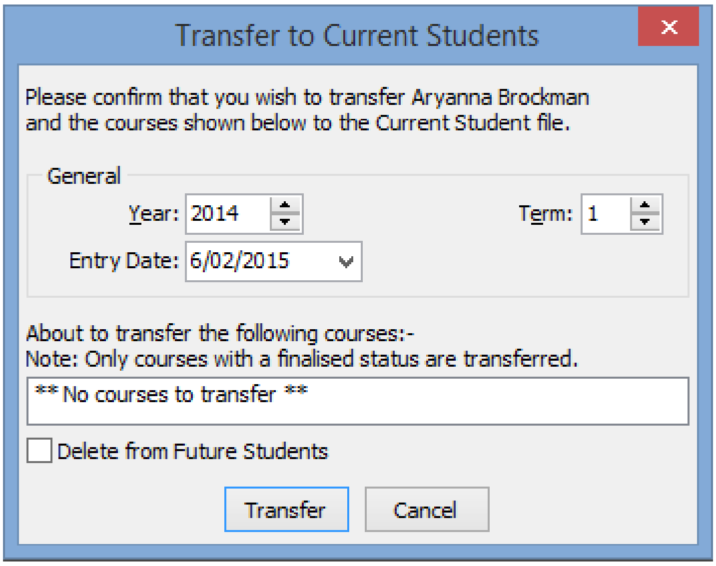
1. Search for the future student in **Future Student Maintenance**.

   The **Personal** tab of the **Future Student Maintenance** window is displayed.



2. Click the transfer icon .

   The **Transfer to Current Students** window is displayed.

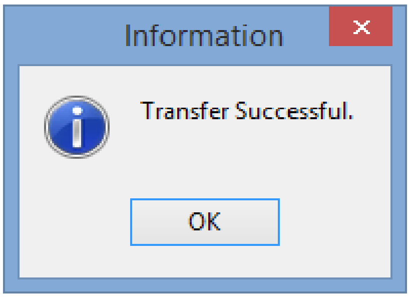


3. Update the transfer details.

4. Click 

.

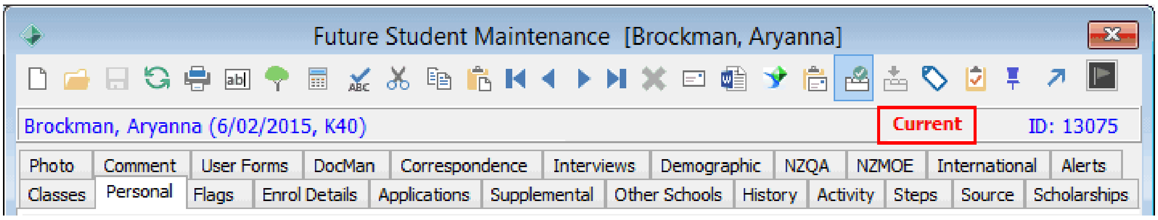
The following dialog window is displayed.



5. Click 

.

The **Future Student Maintenance** window displays Current under the toolbar.



6. Transfer the future student to the current year. See **Transferring individual students** in *Transferring future students to current students* (on page 36) in the Future students or Next year process manual.
7. To add the new student to the current academic year either:
   - Re-run the **Create Next Year Details** process. We suggest you select a file type that is not used. See *Creating next term details* (on page 83) in the Curriculum manual.
   - Use the **Create New Student** wizard in the next year, by selecting **Use Existing ID** and using their existing ID.

Removing a confirmed future student who cancels after the new year is created

If you have a future student who previously confirmed that they would be attending next year but who subsequently cancels, you need to remove them from the **new** academic year manually.

> **Note:** Current year refers to the year that is ending. For example, if today's date is 20th November 2016, then the current year is 2016.
> Next year refers to the new year. For example, if today's date is 20th November 2016, then the next year is 2017.

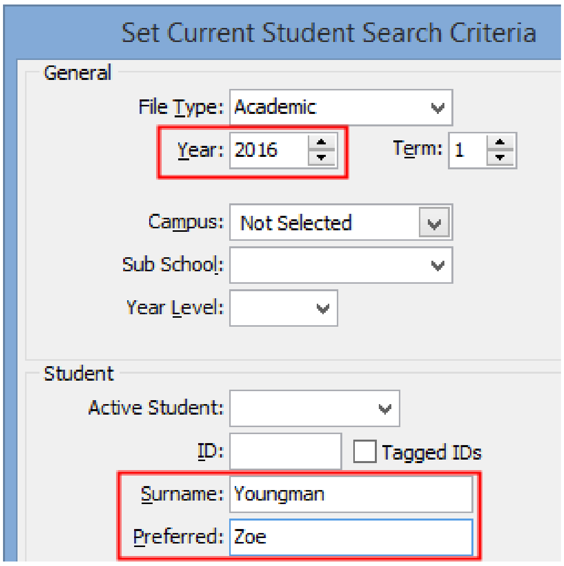
In the following example, Zoe Youngman is a future student who has been converted to a current student as part of the new academic year process for **2012**. Her current student record needs removing from Synergetic.

To remove a cancelling student from the new academic year:

1. Select **Module > Students > Current Student Maintenance** from the main menu.

   The **Set Current Student Search Criteria** window is displayed.

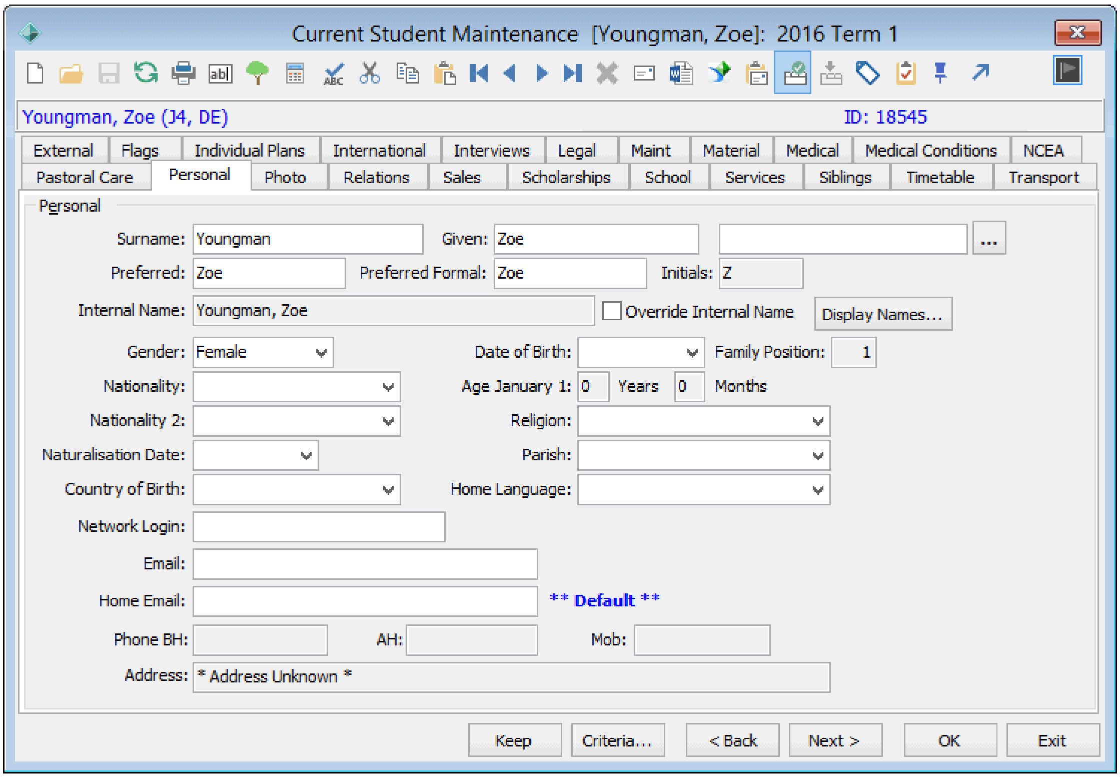
2. Update the **Year** to next year. In this example, **2016**.
3. Update the selection criteria to search for the student.



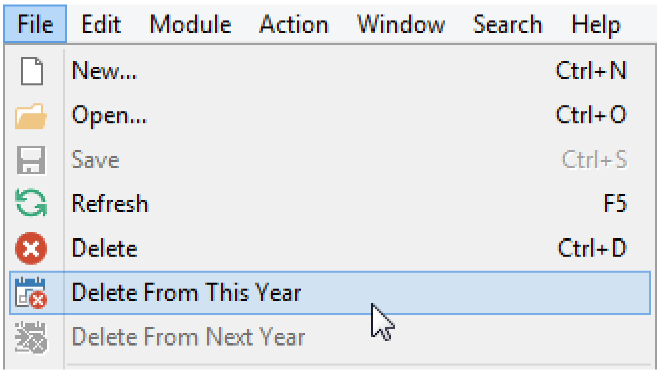
4. Click 

.

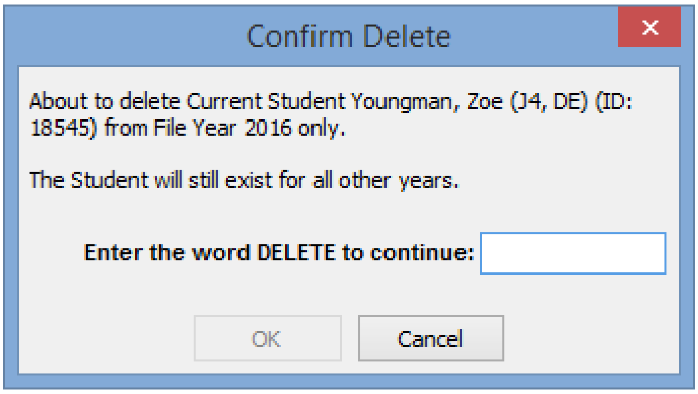
The **Personal** tab of the **Current Student Maintenance** window is displayed.



5. Select **File > Delete From This Year**.



The following window is displayed.



6. Type **delete**.
7. Click 

.

   The student is removed from the selected file year.

Removing a confirmed future student who defers after the new year is created

If you have a future student who previously confirmed that they would be attending next year but who subsequently defers to the following year, you need to:

- remove them from the **new** academic year manually
- restore the future student record, if it was deleted
- set the original application to **cancelled**
- create a new application for the following year that follows your organisation's policy for deferred students.

Note: Current year refers to the year that is ending. For example, if today's date is 20th November 2016, then the current year is 2016.
Next year refers to the new year. For example, if today's date is 20th November 2016, then the next year is 2017.

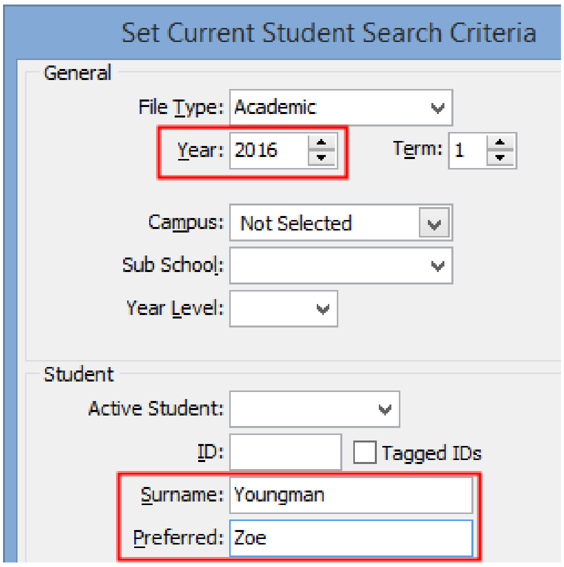
In the following example, Zoe Youngman is a future student who has been converted to a current student as part of the new academic year process for 2012. Her:

- current student record (for 2012) needs removing from Synergetic
- future student record (2011) needs restoring
- application for 2012 needs modifying
- application for 2013 needs creating.

To remove a deferring student from the new academic year and restore their future student record:

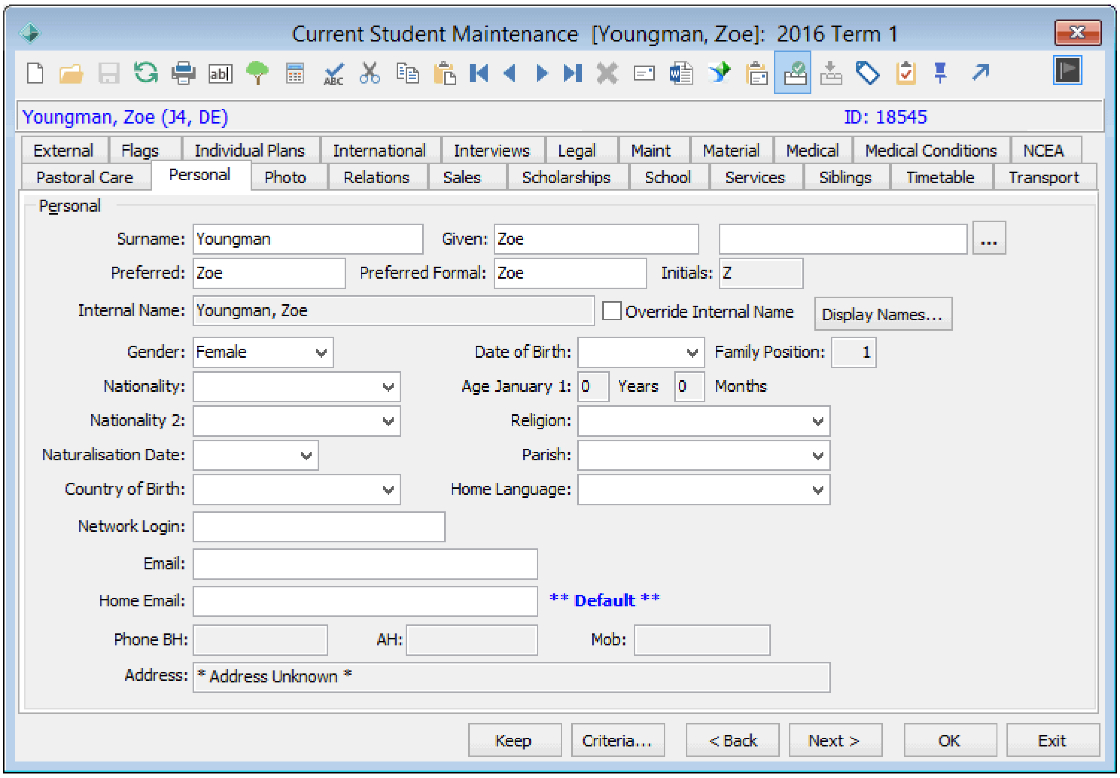
1. Select **Module > Students > Current Student Maintenance** from the main menu.

   The **Set Current Student Search Criteria** window is displayed.
2. Update the **Year** to next year. In this example, **2012**.
3. Update the selection criteria to search for the student.

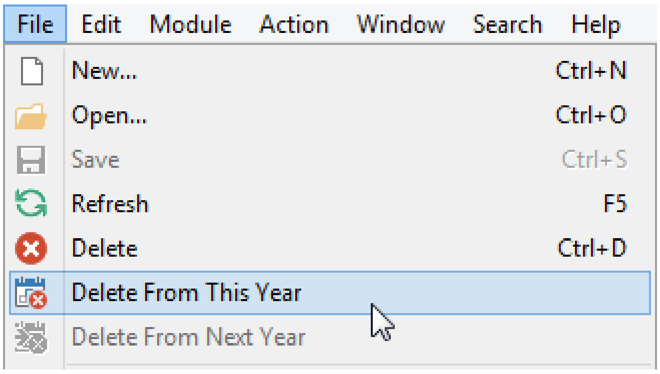


4. Click OK.

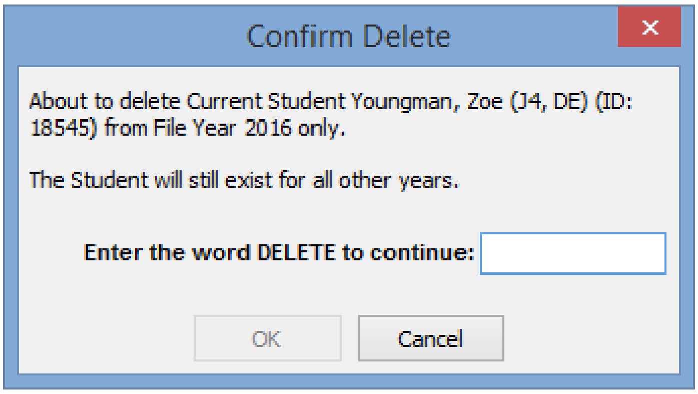
   The **Personal** tab of the **Current Student Maintenance** window is displayed.



5. Select **File > Delete From This Year**.



   The following window is displayed.



6. Type **delete**.

7. Click .

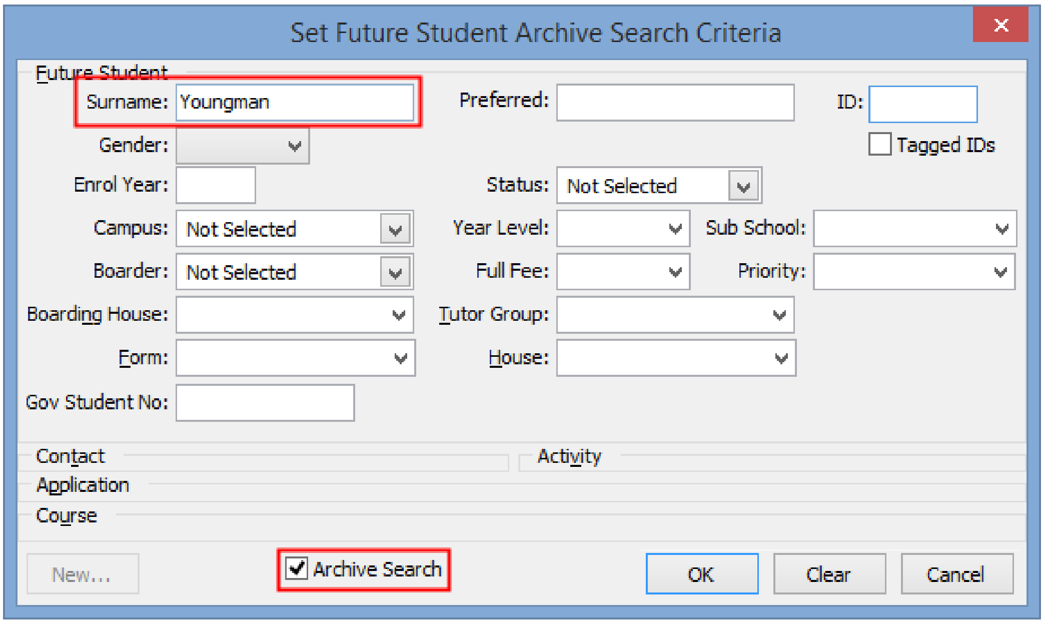
   The student is removed from the selected file year.

8. Select **Module > Future Students > Future Student Maintenance** from the main menu.

   The **Set Future Student Search Criteria** window is displayed.

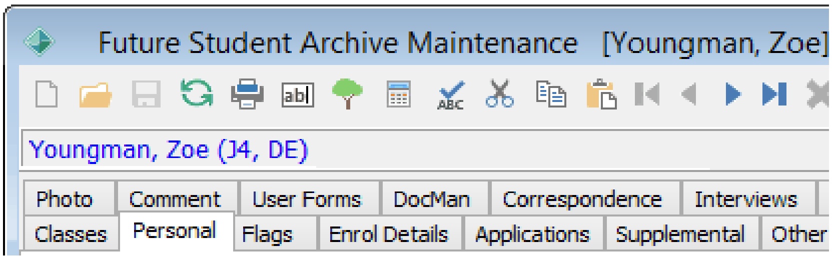
9. Update the search criteria.

10. Select the **Archive Search** field.



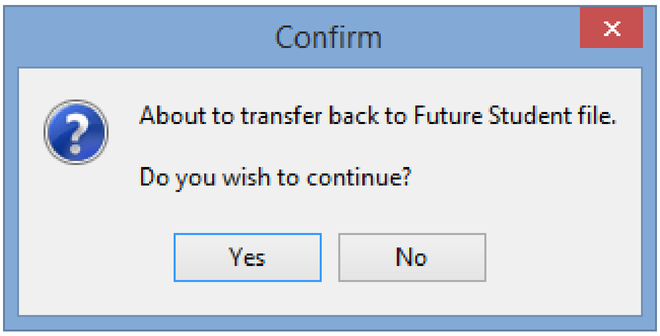
11. Click .

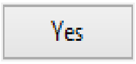
    The **Personal** tab of the **Future Student Archive Maintenance** window is displayed.



12. Click the transfer icon .

    The following window is displayed.



13. Click 

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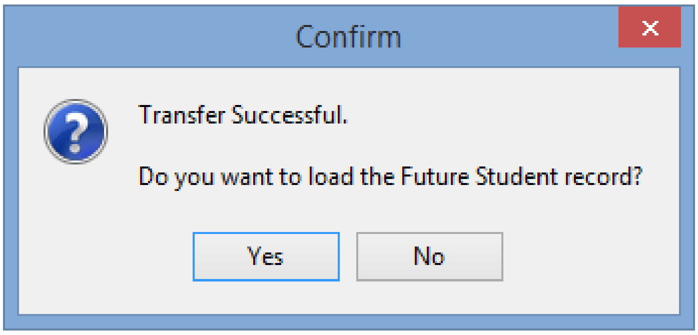
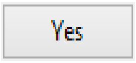
The following window is displayed.



14. Click 

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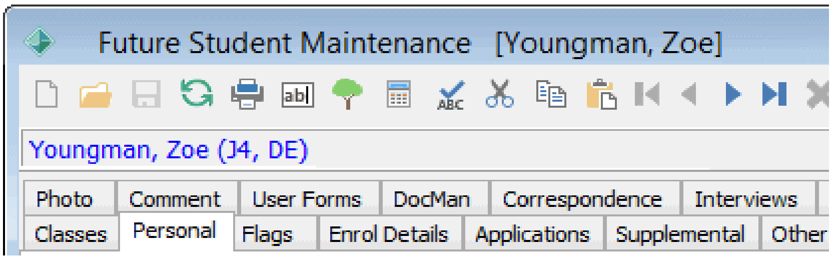
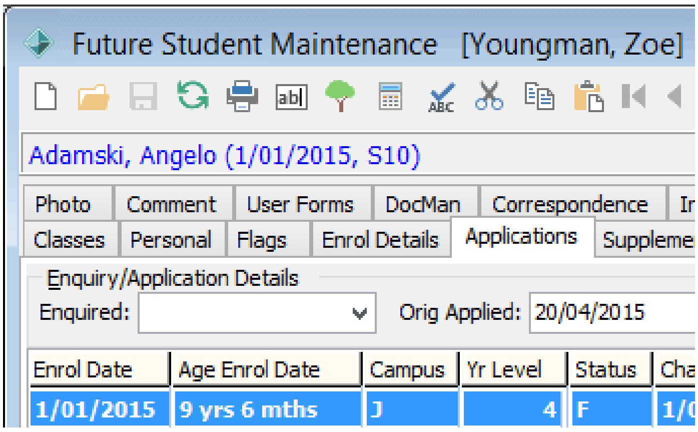
The **Personal** tab of the **Future Student Maintenance** window is displayed.



15. Click the **Applications** tab.

The **Applications** tab of the **Future Student Maintenance** window is displayed. See *Future Student Maintenance - Applications tab* (on page 49) in the Future students manual.



16. Click 

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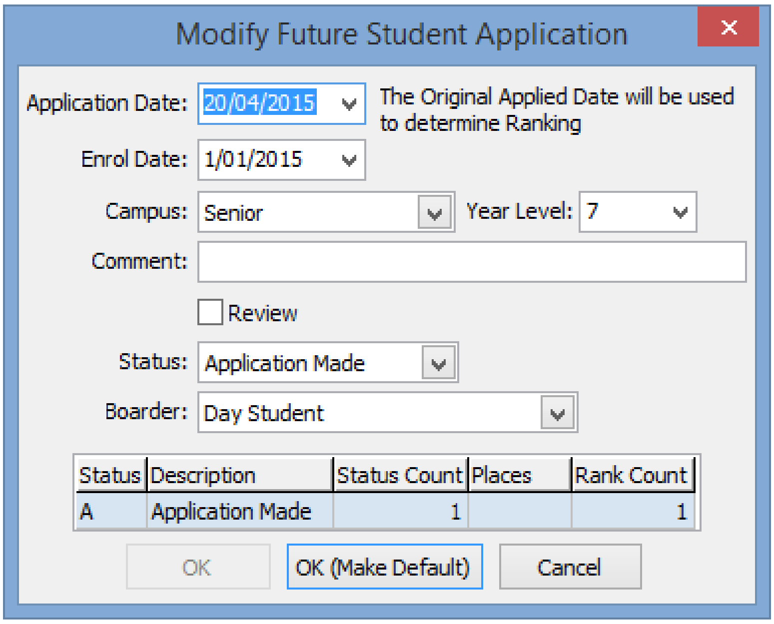
The **Modify Future Student Application** window is displayed.

17. Select **Cancelled** from the **Status** drop-down list. See *Modifying future student enrolment applications* (on page 57) in the Future students manual.



18. Click 

.

    The **Applications** tab of the **Future Student Maintenance** window is displayed.

19. Create a new enrolment application. See *Creating future student enrolment applications* (on page 54) in the Future students manual.

    This application follows the process your organisation applies to deferred students.

Transferring current students to past students

Students are maintained in three distinct groups:

- current students
- past students
- future students.

When current students leave your organisation you transfer them to the **past students** constituency. You can either:

- Transfer an individual student. See *Transferring a current student using Student Maintenance* (on page 112).
- Transfer a group of students. See *Transferring a group of current students to past students* (on page 115).

It is also possible to delete a current student from Synergetic, though this is not recommended. See *Deleting a current student* in the Current students manual.

Transferring a current student using Student Maintenance

Use the **Student Maintenance** window to transfer a current student to the **Past Student** constituency:

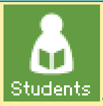
You would normally use this function only when you no longer need to produce an academic report; after the date that a student departs during the year. Alternatively, set the **Status** to **Leaving** or **Left** on the **School** tab. See *Current Student Maintenance - School tab - Status sub-tab* (on page 7) in the Current students or Next year process manual.

> **Note:** You can transfer past students back to current students. Check the transferred records, as some fields may not be restored.

To transfer a current student to the **Past Student** constituency.

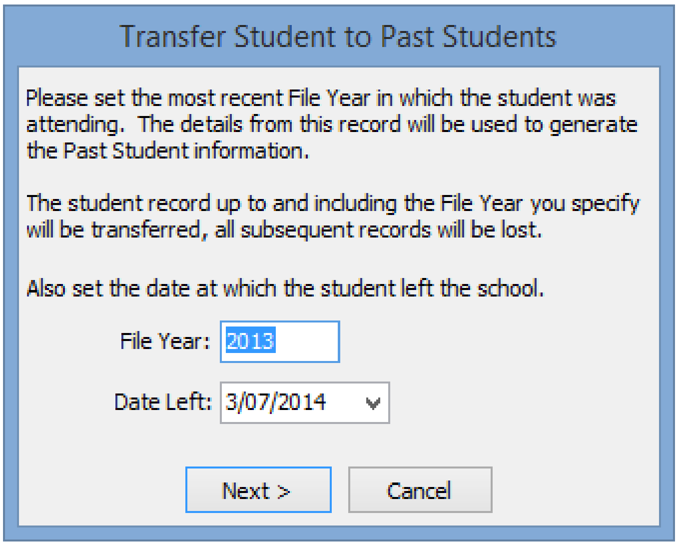
1. Select **Module > Students > Current Student Maintenance** from the main menu.

   The **Set Current Student Search Criteria** window is displayed.

   > **Tip:** You can also access the current student functions by clicking 
   > .

2. Search for the student. See *Searching for existing students* in the Current students manual.
3. Either:
   - Click ↗ on the **Current Student Maintenance** toolbar.
   - Select **Action > Transfer to Past Students** from the main menu.

   The **Transfer Student to Past Students** window is displayed.

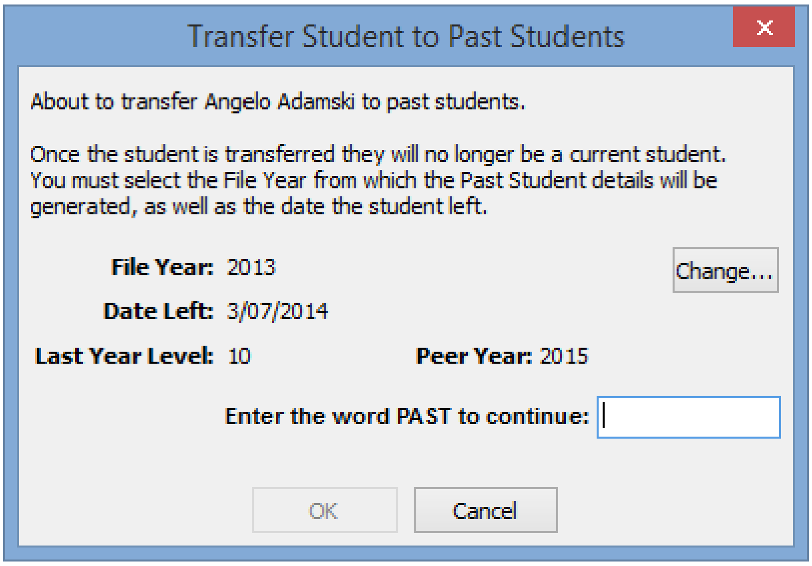
   

4. Change the **File Year** and **Date Left** fields, if required.

5. Click 

.

The **Transfer Student to Past Students** window is displayed.



6. Type **past** to confirm.
7. Click 

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The student is transferred to Past Students.

Transfer Student to Past Students window key fields and buttons

Fields

Field	Description
File Year	Year the student left your organisation. **Note:** This is used to generate past student information. **Note:** It may also be used to create the **peer year**, depending on the **UseEntryDate** configuration setting. See *UseEntryDate configuration setting* in the System maintenance manual.
Date Left	Date the student left your organisation. **Tip:** If you have already specified the **Leaving Date** of the student you do not need to type this value. See *Current Student Maintenance - School tab - Status sub-tab* (on page 7). If not, the status and leaving date are updated automatically for you.

Buttons

Button	Description
Change...	Change the dates previously entered into the **Transfer Student to Past Students** window.

Transferring a group of current students to past students

Use this program to transfer a group of current students to the **Past Students** constituency. Before running this program:

- Ensure that students who are staying have been transferred into the next semester (next year). See *Updating the status of current students* (on page 4) in the Curriculum or Next year process manual.
- Determine whether the peer year is based on the student's entry date rather than the leaving year and **YearsUntilGraduation** fields. See *UseEntryDate configuration setting* in the System maintenance manual.
- Verify that the **luYearLevel** lookup table is correct if it is used (refer to the previous bullet point). Check that the **YearsUntilGraduation** field is correct for a given year. For example the **Year 12** value should be **zero** for Australia and the **Year 13** value should be **zero** for New Zealand. See *luYearLevel lookup table* (on page 60) in the System maintenance or Next year process manual.

Synergetic selects the students to transfer from those students that have either:

- **not** been transferred into the next semester of next year
- with a leaving date on or before the date specified in the selection window.

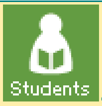
Note: You can transfer past students back to current students. Check the transferred records, as some fields may not be restored.

Opening the Transfer Students to Past Students window

To open the **Transfer Students to Past Students** window:

1. Select **Module > Students > Transfer Students to Past Students** from the main menu.

   The **Set Current Student Search Criteria** window is displayed.

Tip: You can also access the current student functions by clicking 

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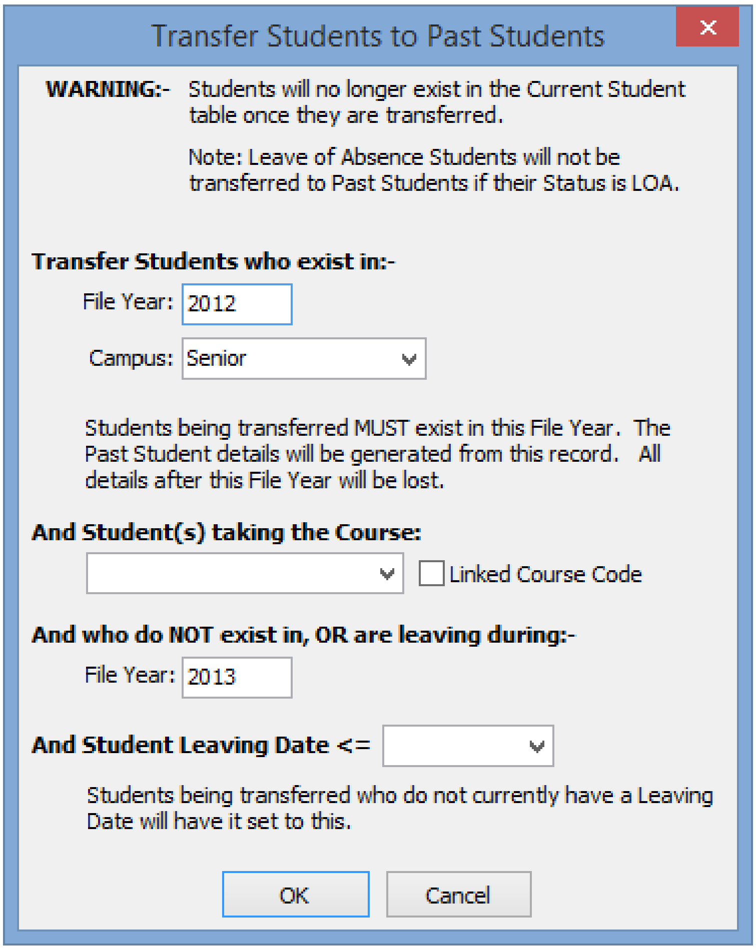


Transfer Students to Past Students window key fields

Field	Description
Transfer Students who exist in File Year	Year in which the current students exist. **Important:** Ensure that the year entered is correct, as **all** details after this file year are moved.
Campus	Campus in which the current students exist. Leave blank to transfer all students according to the other criteria regardless of campus.
And Student(s) taking the Course	Course the current students to be transferred are enrolled in.
Linked Course Code	Either: • Select to transfer current students with courses that are linked to the course code specified. **Note:** This uses the **Linked Course Code** as a basis for the transfer rather than the **Course Code**. • Clear when not using Course as a transfer criterion.
And who do Not exist in, OR are leaving during File Year	Year the current students have: • **not** been transferred to next semester (that is, next year) • are leaving during the next year. **Important:** Ensure that the current students that are staying have been transferred to next semester.
And Student Leaving Date	Students with a **Leaving Date** before this date. See *Current Student Maintenance - School tab - Status sub-tab* (on page 7) in the Current students or Next year process manual.

Entering debtor charges

You use **Debtor Charges Entry** to create and post any type of charges that an enrolled student may incur. You maintain the existing charges and create new charges in *Maintaining debtor fees* in the Debtors manual.

You usually use **Debtor Charges Entry** for ad hoc charges to individual students. For example, charging future students for school books before the new year. **Debtor Charges Entry** is mainly used for current students and incidental charges. You can only run charges in Synergetic when you have the new reporting period created and set up.

A debtor charge posting automatically updates:

- the general ledger for fee code allocations
- the debtor's control account
- transactions in the debtors ledger.

To process debtor charges:

- Either:
  - Select an existing posting. See *Selecting existing debtor charges postings* (on page 120).
  - Add a new posting. See *Adding new debtor charges postings* (on page 121).
- Add new debtor charges. See *Debtor Charges Entry* (on page 123). This includes:
  - Finding the student or debtor who you want to apply the charge to.
  - Enter the details of the charge in the **Fee Detail** area.
  - If required, change the general ledger code(s) that the charge applies to.
- Perform key actions with the posting. See *Debtor Charges Entry - Posting Actions* (on page 132).
- You can also import debtor charges. See *Importing debtor charges* (on page 134).

Selecting existing debtor charges postings

The **Select Debtor Charges to Process** window shows a list of all current postings. Either:

- Highlight a current posting and click 

.
- Click **New Debtor Charges Posting** to create a new posting. See *Adding new debtor charges postings* (on page 121).

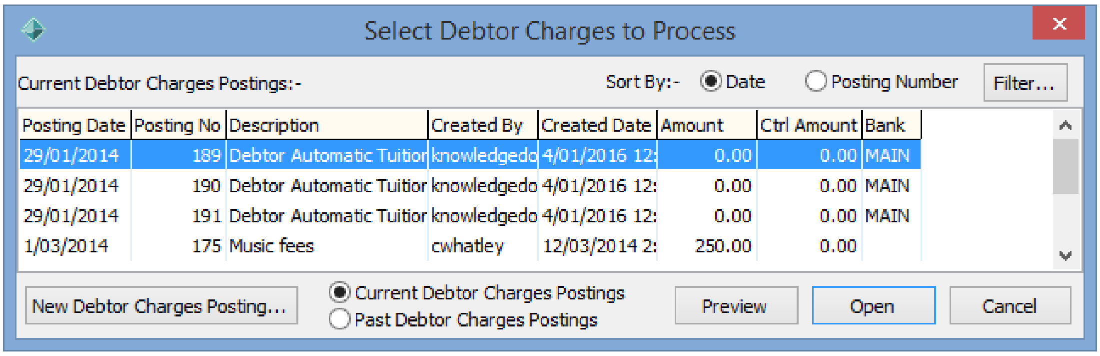
The debtor charges you enter will be in the selected posting.

Opening the Select Debtor Charges to Process window

To open the **Select Debtor Charges to Process** window:

1. Select **Module > Debtors > Debtor Charges Entry** from the main menu.

   The **Select Debtor Charges to Process** window is displayed.



Note: You can display past postings by selecting **Past Debtor Charges Postings**. For example, you can update details if siblings have received discounts they were not entitled to during the Automatic Tuition run.

2. Find the existing posting.
3. Click 

.

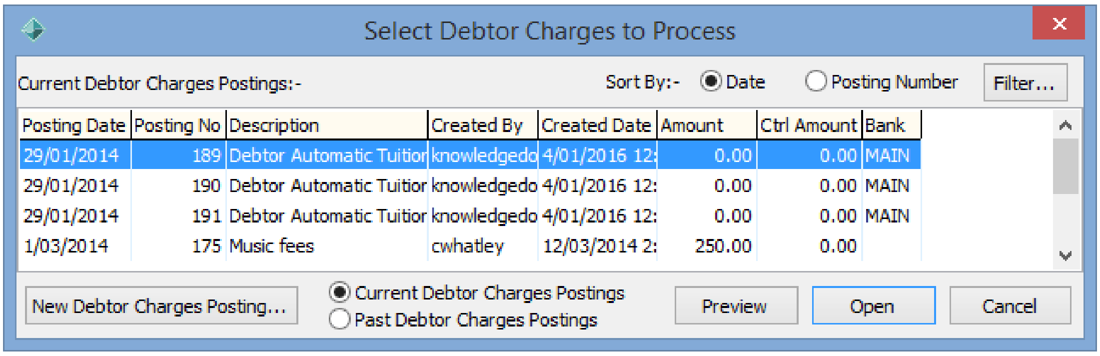
   The **Debtor Charges Entry** window is displayed. See *Debtor Charges Entry* (on page 123).

Adding new debtor charges postings

To add new debtor charges postings:

1. Select **Module > Debtors > Debtor Charges Entry** from the main menu.

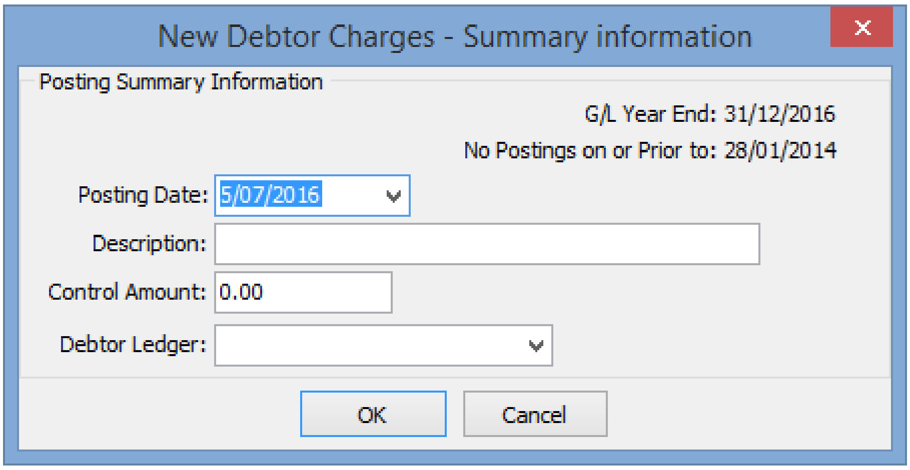
   The **Select Debtor Charges to Process** window is displayed.



Tip: You can use current debtor charges postings by finding the posting and clicking Open.

2. Click New Debtor Charges Posting... .

   The **New Debtor Charges - Summary information** window is displayed.



3. Enter posting summary information.
4. Click OK.

   The **Debtor Charges Entry** window is displayed. See *Debtor Charges Entry* (on page 123).

New Debtor Charges - Summary information window key fields

Field	Description
Date	Posting date.
Description	Description of the posting. This is optional but is useful when reviewing past postings.
Control Amount	The total amount entered in the posting's transactions must add up to this value. This is optional but is a precautionary measure, as you cannot **close off** a posting if the sum of transactions does not equal this value.
Debtor Ledger	Select which ledger to post to.

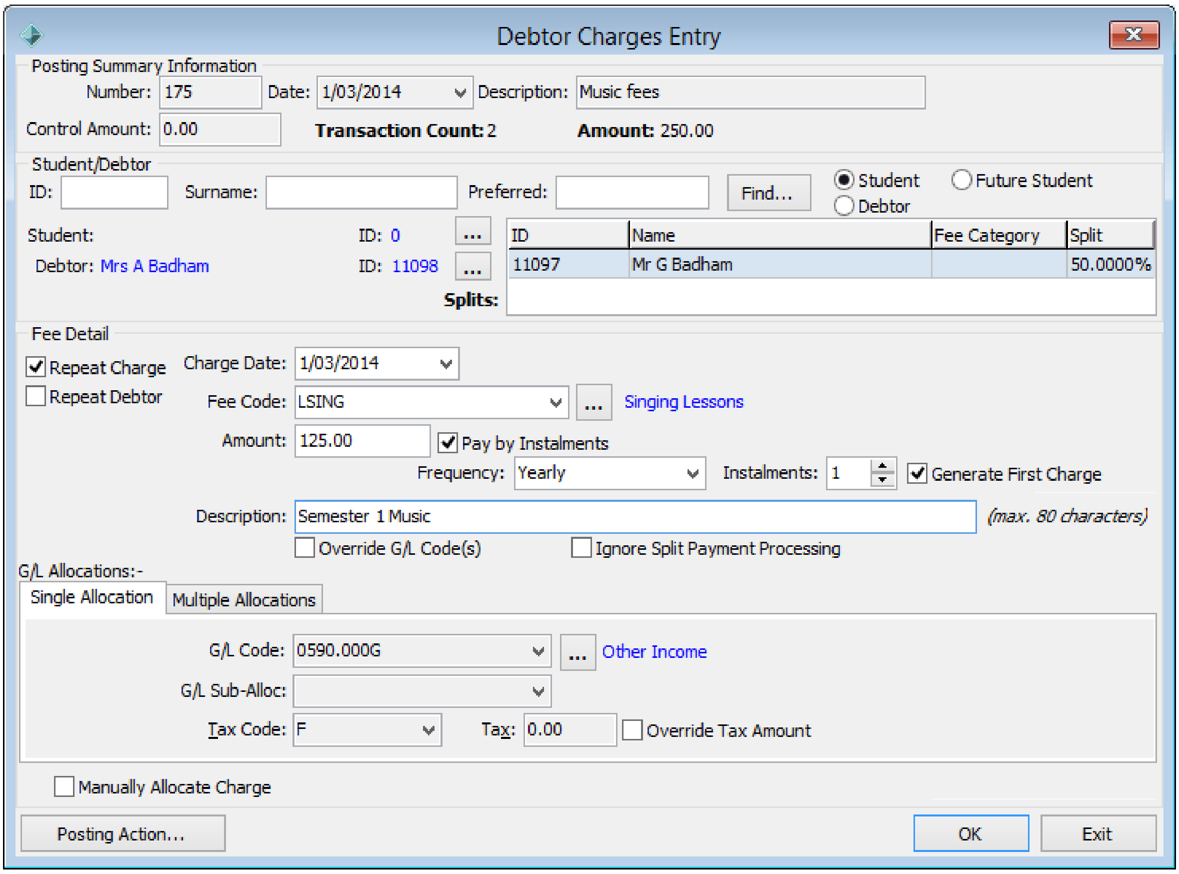
Debtor Charges Entry

Use the **Debtor Charges Entry** window to add debtor charges to the selected posting.

To add new debtor charges:

1. Add or select a debtor charges posting. Either:
   - Select an existing posting. See *Selecting existing debtor charges postings* (on page 120).
   - Add a new posting. See *Adding new debtor charges postings* (on page 121).

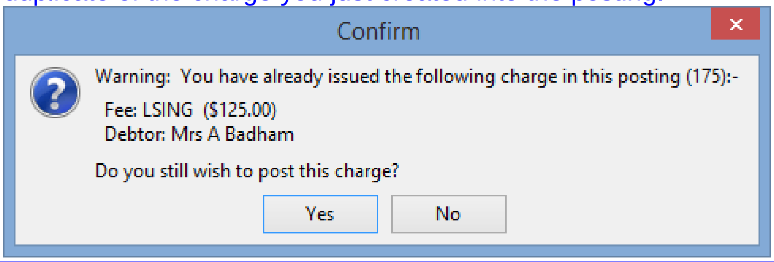
   The **Debtor Charges Entry** window is displayed.



2. Enter details of the debtor, the fee and the general ledger allocations.

3. Click OK to save the details of the debtor charge.

Note: If you click OK a second time, Synergetic warns you that you are about to enter a duplicate of the charge you just created into the posting.



4. Repeat steps **2** and **3** to add charges for the same or another debtor.
5. Click **Posting Action** to perform key actions. See *Debtor Charges Entry - Posting Actions* (on page 132).
6. Click Exit when finished.

Debtor Charges Entry window key fields and buttons

Posting Summary Information area fields

This area displays information about the posting that the entry of this charge is contained in.

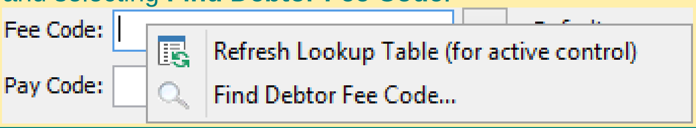
Fields

Field	Description
Number	Posting number.
Date	Posting date.
Description	Description of the posting. This is optional but is useful when reviewing past postings.
Control Amount	The total amount entered in the posting's transactions must add up to this value. This is optional but is a precautionary measure, as you cannot **close off** a posting if the sum of transactions does not equal this value.
Transaction Count	Number of transactions being posted.
Amount	Amount of the posting.

Student Debtor area fields

You can either search for the student that this charge is for, or for the debtor to be charged. See *Searching for students or debtors - Debtor Charges Entry* (on page 130).

Fee Details area fields

Field	Description
Repeat Charge	Select to indicate that the same charge will be entered to another debtor or student after the current charge.
Repeat Debtor	Select to indicate that the same debtor will be used for the next charge to be entered after the current charge.
Charge Date	Date recorded against the interest charge transaction, if overdue charges are applicable for the debtor. This field is also used for transaction and statement dates.
Fee Code	Code used to identify the type of fee to be applied. See *Maintaining debtor fees* in the Debtors manual. **Tip:** You can search for fee codes by right clicking on the **Fee Code** field and selecting **Find Debtor Fee Code**. 
Amount	Amount of the charge to be applied. This defaults to the fee code's default amount.
Pay by Instalments	Select this if the charge is to be paid by instalments. **Note:** The instalment details default to those defined in **Debtor Fee Maintenance**. See *Maintaining debtor fees* in the Debtors manual.
Frequency	If **Pay by Instalments** is selected, select the frequency of instalments. See the *luDebtorInstalmentFrequency lookup table* in the Finance manual.
Instalments	If **Pay by Instalments** is selected, select the number of instalments.
Generate First Charge	If **Pay by Instalments** is selected, select to automatically generate the first instalment charge.
Description	Meaningful description of the charge. **Tip:** If you have selected **Charge Description Only (copies fee desc if not entered)** for this **Fee Code** in the **Fee Maintenance** window, leave the posting description blank and Synergetic will copy the current **Fee Description** into the statement description.

G/L Allocations area fields

The **G/L Allocation** area is used to allocate the charge to one or more G/L codes.

Field	Description
Override G/L Code(s)	Select to override the general ledger codes that default for the **Fee Code**. You can then: • change the G/L code • change the G/L Sub Allocation code • change the tax code • override the tax amount. **Note:** If you change the **Fee Amount** after overriding the tax amount, the override is removed to prevent incorrect tax allocations.
Ignore Split Payment Processing	If split payments have been defined for this debtor, they are not applied to this charge.
Manually Allocate Charge	Allocate the debtor charge against existing transactions instead of relying on automatic allocations. Can be used for credits to previous unpaid charges. **Note:** Negative amounts are automatically allocated in the following order: newest outstanding charge dated on or prior to the date of the credit; any other outstanding charges dated on or prior to the date of the credit; outstanding charges dated after the credit.
Allocate to Statement	Allocate the debtor charge to a previously produced statement. This option is off by default. To enable **Allocate to Statement** select the **Allow Allowance to Statement when Entering Charges** field in **System > Finance Configuration Maintenance > Debtors tab > Page 2 sub-tab**. **Important Note**: Use with care. This will affect ageing and charges will not appear on any future statements produced. For example, use if a previous statement needed modification.

Single Allocation sub-tab fields

Field	Description
G/L Code	The general ledger code of the charge.
G/L Sub-Alloc	The general ledger sub-allocation code for the charge.
Tax Code	The tax code for the charge.
Tax	The tax amount of the charge.
Override Tax Amount	Select to override the amount of tax on this charge. **Note**: If overriding tax amount multiple journals are generated, one for the taxable portion and one for the tax free portion.

Single Allocation sub-tab buttons

Button	Description
...	Launch **General Ledger Maintenance** to add or modify general ledger codes. See *Maintaining general ledger accounts* in the General ledger manual.

Multiple Allocation sub-tab fields

Field	Description
G/L Code	The general ledger code of the charge.
G/L Sub-Alloc	The general ledger sub-allocation code for the charge.
G/L Description	Description of the general ledger code.
Percent	Percentage of the total charge amount allocated to this general ledger code.
Enter Amount	Amount allocated to this general ledger code.
Tax Code	The tax code for the charge.
G/L Amount	Amount allocated to this general ledger code after tax.
Tax	The tax amount of the charge.
Override Tax Amount	Select to override the amount of tax on this charge.

Multiple Allocations sub-tab buttons

Button	Description
...	Launch **General Ledger Maintenance** to add or modify general ledger codes. See *Maintaining general ledger accounts* in the General ledger manual.
Add	Add a general ledger code to the list.
Delete	Delete the highlighted general ledger code from the list.

Buttons

Button	Description
... **(Student ID)**	Launch into **Current Student Maintenance** for the selected student. See *Maintaining current students* in the Current students manual.
... **(Debtor ID)**	Launch into **Debtor Maintenance** for the selected debtor. See *Maintaining debtors* in the Debtors manual.
... **(Fee Code)**	Launch into **Debtor Fee Maintenance** for the selected fee. See *Maintaining debtor fees* in the Debtors manual.
Posting Action...	Perform the following actions: • close off the current posting • change the control amount, posting description or posting date • delete debtor charges in the current posting • change to another posting • create a new posting • view a copy of the audit print • abandon the current posting • return to editing the debtor charge in the current posting. See *Debtors Charges Entry - Posting Actions* (on page 132).

Searching for students or debtors - Debtor Charges Entry

You can either search for either the:

- student that this charge is for
- the future student that this charge is for
- debtor to be charged.

Note: If you are running in family billing mode it is recommended that you search by the student, if possible. This ensures that charges are applied to the student incurring them. For more information on searching see *Searching* in the Introduction manual.

To search for a student:

1. Select **Student**.
2. Enter enough information to identify the student in the **ID**, **Surname** and/or **Preferred** fields.
3. Click Find... .

   The **Student Search** selector grid is displayed.
4. Select the required student
5. Click OK .

   The student and their debtor details are displayed on the **Debtor Charges Entry** window.
6. If the student does not have a debtor associated with them, you can either:
   - Add the debtor. See *Creating new debtors* in the Debtors manual.
   - Add the new debtor to the student record. See *Current Student Maintenance - Debtor tab* in the Current students manual.
   - Skip charging the student.

To search for a future student:

1. Select **Future Student**.
2. Enter enough information to identify the student in the **ID**, **Surname** and/or **Preferred** fields.
3. Click Find... .

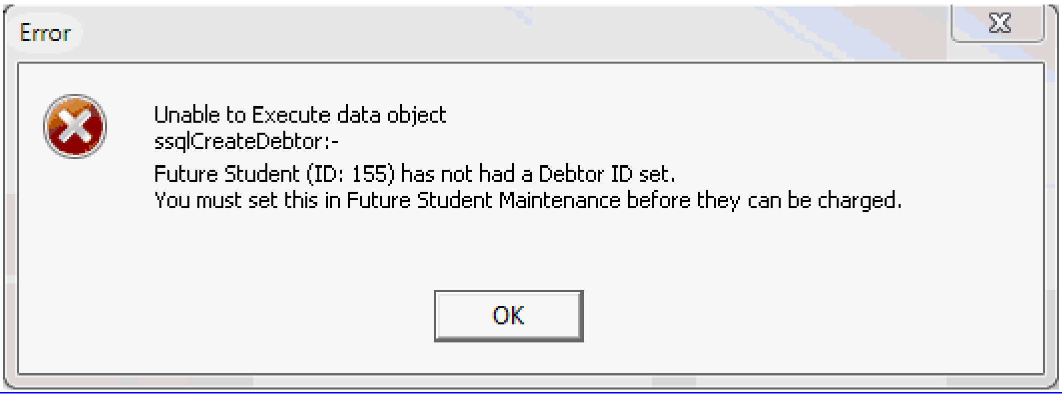
   The **Future Student Search** selector grid is displayed.
4. Select the required future student.

5. Click 

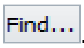
.

   The future student and their debtor details are displayed on the **Debtor Charges Entry** window.

   Note: If the future student you have selected has not been given a **Debtor ID** in the **Debtor** tab of **Future Student Maintenance**, an error message appears and you will not be able to apply charges to the future student. See *Future Student Maintenance - Debtor tab* in the Future students manual.

To search for a debtor:

1. Select **Debtor**.
2. Enter enough information to identify the debtor in the **ID**, **Surname** and/or **Preferred** fields.
3. Click 

.
4. The **Debtor Search** selector grid is displayed.
5. Select the required debtor.
6. Click 

.

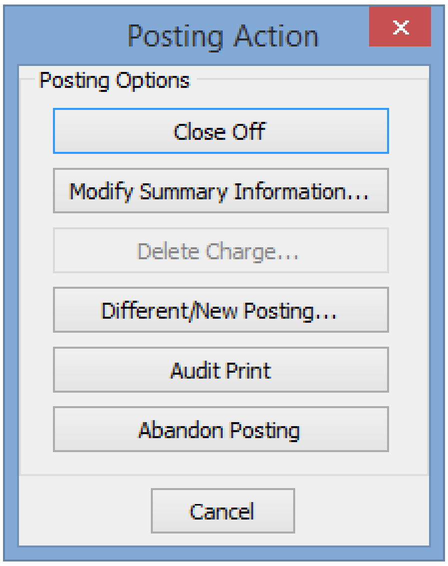
   The debtor details are displayed on the **Debtor Charges Entry** window.

   Note: You can also launch into **Student Maintenance** or **Debtor Maintenance** to view or update details of the student debtor.

Debtor Charges Entry - Posting Actions

The **Posting Action** button on the **Debtor Charges Entry** window is used to:

- close off the current posting
- change the control amount, description, posting date or sub ledger (if activated)
- delete all the debtor charges in the current posting
- change to another posting
- create a new posting
- view a copy of the audit print
- abandon the current posting
- return to editing the debtor charge in the current posting. See *Debtor Charges Entry* (on page 123).



Note: You cannot edit postings already reconciled in a past or open bank reconciliation.

Actions

Action	Description
Close Off	Update the posting control record so that it recognises that the posting has been closed off. The posting can still be accessed through **Past Postings**. When you close off the posting, an audit sheet of debtor charges are automatically printed.
Modify Summary Information	Allows you to change the control amount, description or posting date, if in the same financial year. You can also view the **Posting number** and **General Ledger** period.
Delete Charge	Delete the selected charge. **Note:** Only charges that have not appeared on a statement can be deleted.
Different/New Posting	Either change the current posting that you are working on, or create a new posting without updating the posting you are currently working on.
Audit Print	View a copy of the audit print showing the current posting that you have entered. **Note:** Users with Select privileges for DebtorChargesEntry can only perform previews.
Abandon Posting	Delete all charges entered in the current posting. **Note:** You must have **Abandon Posting** privileges for **DebtorChargesEntry** to be able to abandon postings. See *Group/User Security Maintenance - Groups View* in the System maintenance manual.
Cancel	Return to editing the current posting.

Importing debtor charges

Use the **Debtor Charges Import** window to import debtor charges from an external application.

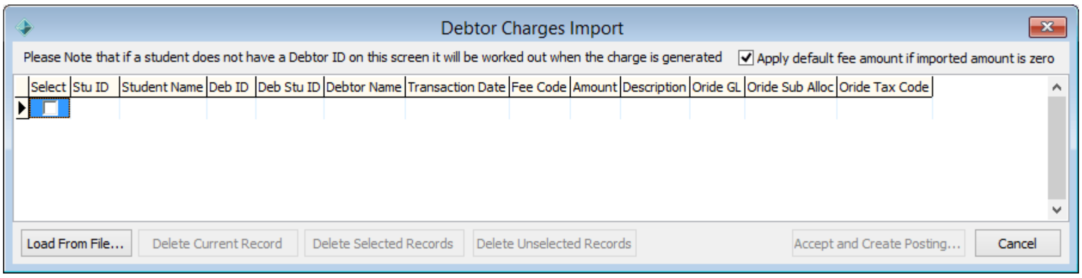
For more detail on the format of import files, see *Loading debtor charges merge files* in the Debtors manual.

Opening the Debtor Charges Import window

To open the **Debtor Charges Import** window:

1. Select **Module > Debtors > Debtor Charges Import** from the main menu.

   The **Debtor Charges Import** window is displayed.

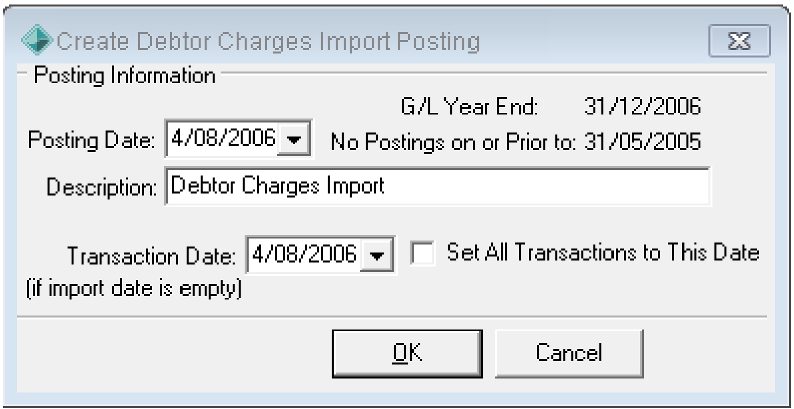


Debtor Charges Import window key fields and buttons

Fields

Field	Description
Apply default fee amount if imported amount is zero	Select to apply a default fee to the charge if the imported charge has an amount of zero.
Select	Use to select one or more records. You can then delete either: • selected records • records not selected.

Buttons

Button	Description
Load from File...	The **Load Merge File** window is displayed. See *Loading debtor charges merge files* in the Debtors manual.
Delete Current Record	Delete the highlighted record.
Delete Selected Records	Delete records that have their **Select** flag set.
Delete Unselected Records	Delete records that have their **Select** flag cleared.
Accept and Create Posting...	Accept the records on the window and create a posting with the imported general ledger journals. The **Create Debtor Charges Import Posting** window is displayed.  1. Confirm the details on the window and click OK. 2. Click Yes to confirm the posting. The journals are closed off and printed.

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Creating the next general ledger year

You create next year's general ledger when you are ready to either enter:

- budgets
- general ledger postings for the year.

Before creating next year's general ledger you can inactivate unneeded general ledger accounts. Unneeded general ledger accounts are not carried over to the next G/L year.

Note: Synergetic lets you work with two years of data. For example, if you create 2017, you can work in 2016 and 2017.

Creating a general ledger year closes off another. For example, 2015 is closed and general ledger journals can no longer be posted to it.

After creating the next year's general ledger:

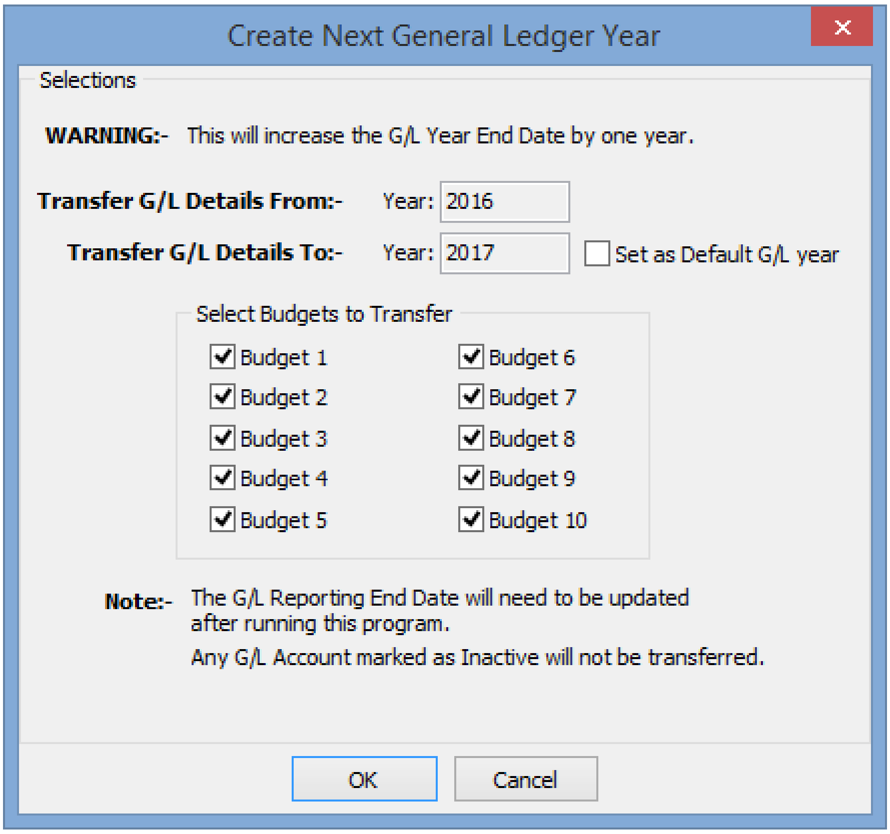
- You can continue to post to the current year.
- Postings to the current year are also posted to next year as well, including P&L accounts. These are posted to the profit and loss Appropriation account in the next year.
- You can run financial reports for next year as well as this year.

Opening the Create Next General Ledger Year window

To open the **Create Next General Ledger Year** window:

1. Select **Module > General Ledger > Create Next Year General Ledger** from the main menu.

   The **Create Next General Ledger Year** window is displayed.



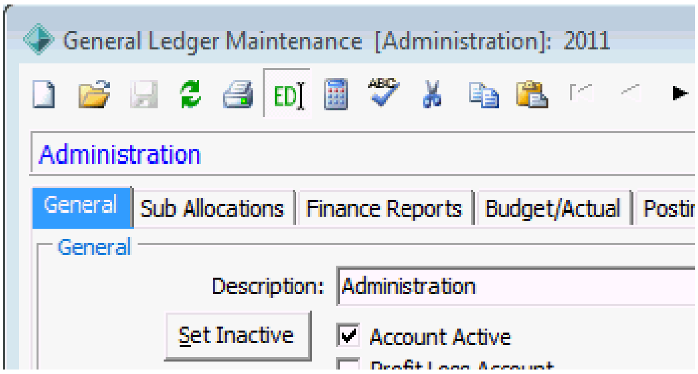
Inactivating general ledger accounts

Also see *General Ledger Maintenance - General tab* in the General ledger manual.

To inactivate general ledger accounts that are not required in next year's general ledger:

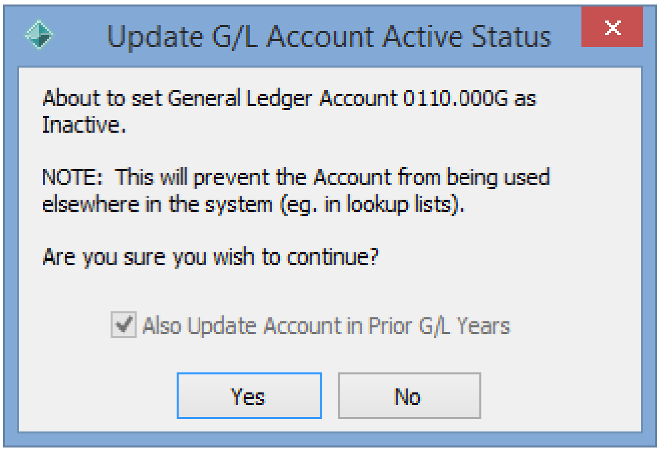
1. Search for the general ledger account to inactivate. See *Searching for general ledger accounts* in the General ledger manual.

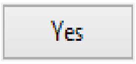
   The **General** tab of **General Ledger Maintenance** is displayed.



2. Click Set Inactive.

   The **Update G/L Account Active Status** window is displayed.



3. Click 

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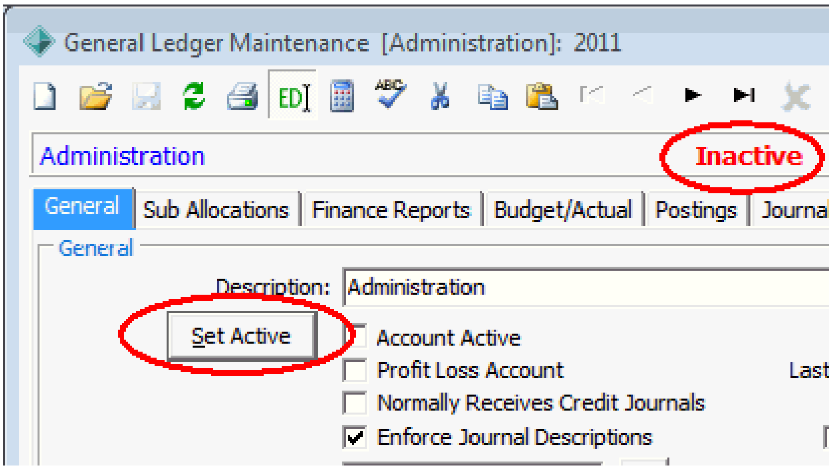
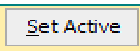
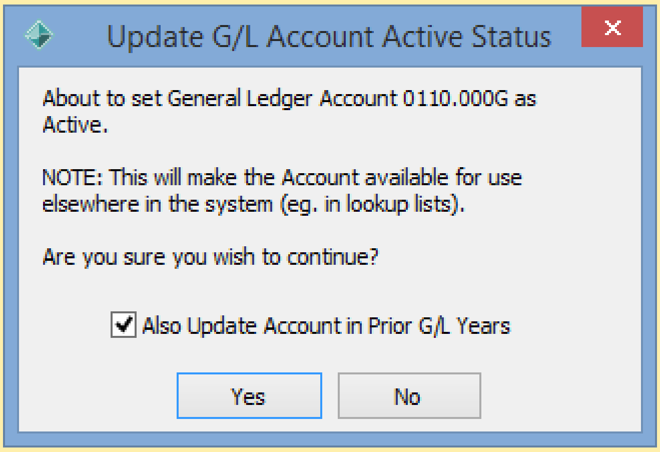
The general ledger account is set to inactive, as indicated next to the account name.



Tip: You can activate the account later by clicking 

. Use the **Update G/L Account Active Status** window to activate the account for the next year and prior years as well, if required.

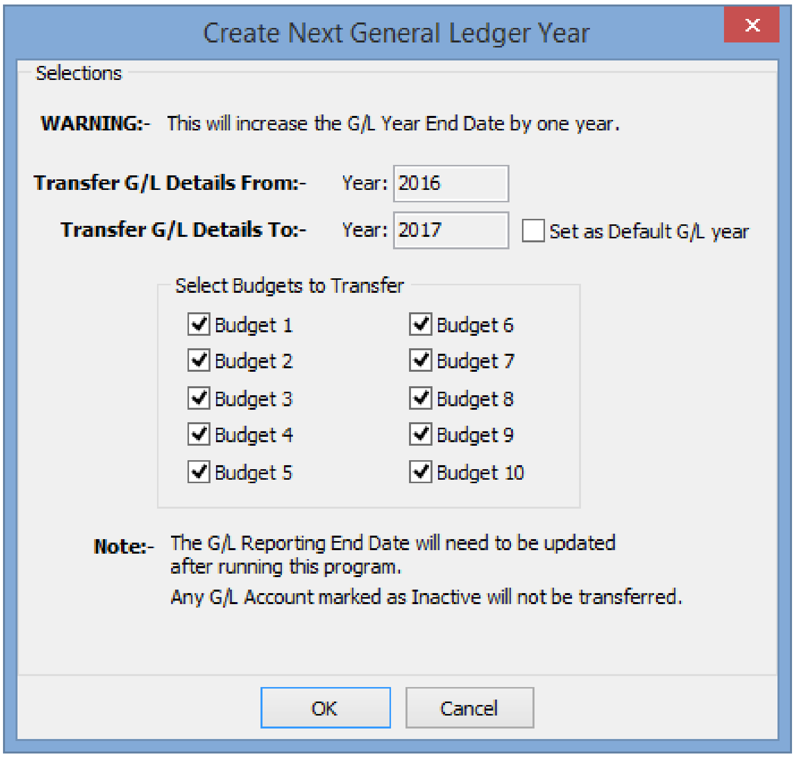


4. Repeat steps **1** through **3** for each account that you need to inactivate.

Creating next year's general ledger

To create next year's general ledger:

1. Open the **Create Next General Ledger Year** window.



2. Update any optional selections.
3. Click OK.
4. Click Yes to confirm you want to proceed.

   All active general ledger accounts are transferred over to the next year.
5. Update the **G/L Reporting End Date** on the **General** tab of **Finance Configuration Maintenance**. See *Synergetic Financial Configuration - General tab* in the Finance manual.

   Important note: Only change this if you have finished running financial reports in the existing period and want to move to a new reporting period. See *Closing off periods* in the General ledger manual.

Create Next General Ledger Year window key fields

Field	Description
Set as Default G/L Year	Select to set the next year as the default general ledger year. Otherwise, the current year is retained as the default general year. You can also change the default year on the **General** tab of **Synergetic Financial Configuration**. See *Synergetic Financial Configuration - General tab* in the Finance manual.
Transfer G/L Budget Amounts	Select to transfer the general ledger budget amounts from the current year to the next year.

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