Gateway Year-end Promotion

THE TASK LIST

When it is close to school year end, designated SGA/Administrations (with Year-end Promotion Management role) should start working on setup the roll group, tutor group, promotion for new and existing students, input the exit date of the leave students. Please follow the Gateway Task List of the Year-end Promotion to keep track the tasks that you need to carry out in three A, B & C stages.

Gateway → Admin → Year-end Promotion→ Task List

Schools might have different task lists, which depends on the modules they are using. SGA may view the full task list of their school, while non-SGA admin (with the Year-end Promotion Management role) will see a shorter list that includes the areas that he/she can access.

The tasks are shown in a preferred working order, however, some tasks' order are not important, e.g. there is no difference to setup Activities first or Room Booking module first.

The **Task 8 is necessary** for all schools to input to tell ESF Gateway Team when would you like to run the Year Start for your school Gateway to switch to a new school year.

For each task, once done, please click *Mark as Complete* to change to indicate the completeness status, which for reference only, you may click it again to resume the status if needed.

A sample task list for Secondary School

Year End Promotion > **Task List**

#	Task	Description	Completion Date	Action
A) Tasks can be started before Gateway Year End 16/17				
1	New Student Information Pack	- Setup and issue Information Pack for new students in May~June - Activate Gateway login for new parents (after the Info Pack is issued).		[Manage | Mark as Complete]
2	Update Roll Group for next year	Create new Roll Groups and hide unused Roll Groups. (The update does not affect current year setup.)		[Manage | Mark as Complete]
3	Update Tutor Group for next year	Create new Tutor Groups and hide unused Tutor Groups. (The update does not affect current year setup.)		[Manage | Mark as Complete]
4	Assign Next Year Roll Group, Tutor Group, House	Start inputting next year Roll Group, Tutor Group, House for new and current students, input exit date for students going to leave after year end.		[Manage | Mark as Complete]
5	Confirm Year End Date	Confirmed the [16/17] Gateway Year End Date in the Attendance Module. Current Year End Date: **2017-06-23**		[Manage | Mark as Complete]
B) Tasks are only available after School Year End (Frozen Period Starts) 16/17				
6	Update Roll Group Teachers	Update the roll group teachers.		[Manage | Mark as Complete]
7	Update Left Staff Status	Mark LEFT for the left staff after Year End. Once mark left, the staff will not be able to log on to Gateway.		[Manage | Mark as Complete]
8	Student Promotion (Roll Over Task)	Run the promotion task to copy the next year Roll Group / Tutor Group / House for new and current students to Maze and wait for Year Start.		[Manage]
9	Year Start in Gateway	Expecting New School Year start date for Gateway. Please notice the following effects after Gateway New School Year started: • Leavers and their parents will not be able to logon to Gateway, especially viewing online ARR, i.e. no access to ARR reports anymore. • Teachers will not be able to edit the ARR of the previous year anymore. • Usually in between of the last week of July and the first week of August.		[🔲 Submit]
C) Tasks can be started after the new Gateway Year Start (Frozen Period Ends).				
10	Setup School Start and End Date	Setup school year start and end date in Attendance module.		[Manage | Mark as Complete]
11	Setup School Open and Close Times	Setup school open and close time for octopus/smart card schools.		[Manage | Mark as Complete]
12	Setup Non-school Days	Setup non-school days in Attendance module.		[Manage | Mark as Complete]
13	Annual Data Refresh	Inform all parents to login Gateway to verify and update their family and student's data on Gateway. If you need the existing parents to sign eNotice(s) at year start, please setup and issue eNotice(s) before inform parent to login.		[Mark as Complete]
14	Select timetable	Select timetable(s) from Maze and map the period and time.		[Manage | Mark as Complete]
15	Timetable Calendar Day Mapping	Mapping the calendar day for Timetable.		[Manage | Mark as Complete]
16	Setup Subject Head	Setup subject head may edit ARR subject settings.		[Manage | Mark as Complete]
17	Archive ARR Reports	Archive previous year's ARR report. This task should be completed one day before updating any student's photo.		[Manage | Mark as Complete]
18	Copy / Move Activities	If you need to move or copy the student registration info from last year to new school year for some activities (e.g. CAS Week/Horizons/No Boundaries).		[Manage | Mark as Complete]
19	Setup New School Activities	Create the new school activities or copy the setup from last year.		[Manage | Mark as Complete]
20	Setup CAS Advisor	Setup CAS Advisor for CAS Commitment for Y11 - Y13 students.		[Manage | Mark as Complete]
21	Setup CAS Commitment Rules	Setup the CAS Commitment Rules for Y11 - Y13 students.		[Manage | Mark as Complete]
22	Setup Y13 HE Tutors	Setup HE Tutors for HE module.		[Manage | Mark as Complete]
23	Room Booking Synchronization	Sync the timetable records from MAZE to Room Booking System.		[Manage | Mark as Complete]

A sample task list for Primary School and Kindergarten

Year End Promotion > **Task List**

#	Task	Description	Completion Date	Action
A) Tasks can be started before Gateway Year End 16/17				
1	New Student Information Pack	- Setup and issue Information Pack for new students in May~June - Activate Gateway login for new parents (after the Info Pack is issued).		[Manage | Mark as Complete]
2	Update Roll Group for next year	Create new Roll Groups and hide unused Roll Groups. (The update does not affect current year setup.)		[Manage | Mark as Complete]
3	Assign Next Year Roll Group, House	Start inputting next year Roll Group, House for new and current students, input exit date for students going to leave after year end.		[Manage | Mark as Complete]
4	Confirm Year End Date	Confirmed the [16/17] Gateway Year End Date in the Attendance Module. Current Year End Date: **2017-06-30**		[Manage | Mark as Complete]
B) Tasks are only available after School Year End (Frozen Period Starts) 16/17				
5	Update Roll Group Teachers	Update the roll group teachers.		[Manage | Mark as Complete]
6	Update Left Staff Status	Mark LEFT for the left staff after Year End. Once mark left, the staff will not be able to log on to Gateway.		[Manage | Mark as Complete]
7	Student Promotion (Roll Over Task)	Run the promotion task to copy the next year Roll Group / Tutor Group / House for new and current students to Maze and wait for Year Start.		[Manage]
8	Year Start in Gateway	Expecting New School Year start date for Gateway. Please notice the following effects after Gateway New School Year started: • Leavers and their parents will not be able to logon to Gateway, especially viewing online ARR, i.e. no access to ARR reports anymore. • Teachers will not be able to edit the ARR of the previous year anymore. • Usually in between of the last week of July and the first week of August.		[☐ 📅 Submit]
C) Tasks can be started after the new Gateway Year Start (Frozen Period Ends).				
9	Setup School Start and End Date	Setup school year start and end date in Attendance module.		[Manage | Mark as Complete]
10	Setup School Open and Close Times	Setup school open and close time for octopus/smart card schools.		[Manage | Mark as Complete]
11	Setup Non-school Days	Setup non-school days in Attendance module.		[Manage | Mark as Complete]
12	Annual Data Refresh	Inform all parents to login Gateway to verify and update their family and student's data on Gateway. If you need the existing parents to sign eNotice(s) at year start, please setup and issue eNotice(s) before inform parent to login.		[Mark as Complete]
13	Create New Subjects	For schools do not use Maze timetable, create new subjects in Subject Class Mapping module.		[Manage | Mark as Complete]
14	Setup Student Subject Class	Setup subject class by roll group or individual students and assign class teachers. • For teachers to view their classes on Gateway • ARR markbook		[Manage | Mark as Complete]
15	Setup Subject Head	Setup subject head may edit ARR subject settings.		[Manage | Mark as Complete]
16	Archive ARR Reports	Archive previous year's ARR report. This task should be completed one day before updating any student's photo.		[Manage | Mark as Complete]
17	Copy / Move Activities	If you need to move or copy the student registration info from last year to new school year for some activities (e.g. CAS Week/Horizons/No Boundaries).		[Manage | Mark as Complete]
18	Setup New School Activities	Create the new school activities or copy the setup from last year.		[Manage | Mark as Complete]
19	Room Booking Synchronization	Sync the timetable records from MAZE to Room Booking System.		[Manage | Mark as Complete]

You may input the below information for new, existing, and leave students for next year:

- Year group
- Roll group
- Tutor group (if applicable to your school)
- House (if applicable to your school)
- Exit date (for leave students only)

You may do setup in the following sequence:

1. **Update Roll Group for next year**: Create new Roll Groups and hide unused Roll Groups
2. **Update Tutor Group for next year**: If applicable, create new Tutor Groups and hide unused Tutor Groups
3. **Bulk Promotion**: batch assign per group if applicable to your school
4. **Individual Promotion**: assign individual student's groups
5. **Verify by the summary reports:** by Report Centre #901, #902
6. **Confirm and Submit Promotion**

Please note that bulk promotion and individual promotion will overwrite each other, so it is suggested to work on the bulk promotion first and then the individual promotion.

1) UPDATE ROLL GROUP FOR NEXT YEAR

This tab allows you to set the Roll Groups list for next year. You may hide those unused groups for next year setup which won't affect the current year settings.

Year End Promotion > **Next Year Roll Group Setup**

This screen is for setup the Group list for next year. You may hide those unused groups for next year setup which won't affect the current year settings.

➕ New ☐ show hidden roll group

Roll Group	Name	Teacher A	Teacher B	Room	Hide
01.1	1.1 NON	O'BRIEN, Nicole		L105	☐
01.2	1.2 LSN	SULLIVAN, Lee		L102	☐
01.3	1.3 KWR	WARNER, Katie		L106	☐
01.4	1.4 NKH	KIPROTICH, Nerida		L103	☐
02.2	2.2 MSD	STAFFORD, Michael		L108	☐
02.3	2.3 CNS	NICHOLS, Claire		G107	☐
02.4	2.4 SMD	MCDAVID, Sarah		G106	☐
03.1	3.1 JES	EDWARDS, Jason		G102	☐
03.2	3.2 KCL	CASSEL, Kim		G105	☐
03.3	3.3 CHN	HANLON, Carmel		G103	☐

2) UPDATE TUTOR GROUP FOR NEXT YEAR

Only if your school use tutor group setup, This function allows you to set the Tutor Groups list for next year. You may hide those unused tutor groups for next year which won't affect the current year settings.

Year End Promotion > **Next Year Tutor Group Setup**

This screen is for setup the Group list for next year. You may hide those unused groups for next year setup which won't affect the current year settings.

➕ New ☐ show hidden tutor group

Tutor Group	Name	Teacher	Hide
07.1	07.1		☐
07.2	07.2		☐
07.3	07.3		☐
07.4	07.4		☐
07.5	07.5		☐
07.9	07.9		☐
08.1	08.1		☐
08.2	08.2		☐
08.3	08.3		☐
08.4	08.4		☐

3) BULK PROMOTION

This tab allows you to batch assign existing students' next year roll group and tutor group, this is particular useful if most of the exiting students will be promoted to the same new group next year, one click to have the majority update done, and then make changes for some students in the **Individual Promotion** screen.

Year End Promotion

Task List | **Bulk Promotion** | Individual Promotion | Submit Promotion

Year End Promotion > **Bulk Promotion**

Please leave empty if there is no next year roll group / tutor group.

Pending for Submit Promotion!

Year Group			Roll Group			Tutor Group		
Year Group(16/17)		Next Year	Roll Group(16/17)		Next Year	Tutor Group(16/17)		Next Year
Y01	->	Y02	01.1	->	02.4 ▼	07.1	->	▼
Y02	->	Y03	01.2	->	02.2 ▼	07.2	->	▼
Y03	->	Y04	01.3	->	▼	07.3	->	▼
Y04	->	Y05	01.4	->	▼	07.4	->	▼
Y05	->	Y06						

It assumes that all students will be promoted to a higher year level, so you don't need to input the Next Year settings by default. However, it is possible to have special year setting for individual students in the next screen.

4) INDIVIDUAL PROMOTION

This screen allows you to input data one by one. Select the drop down filter to input data by batch.

New student

you may start with the New Students, assign the next Year Group, Roll Group, Tutor Group, House.

Year End Promotion

Task List | Bulk Promotion | **Individual Promotion** | Submit Promotion

Year End Promotion > **Individual Promotion**

Export For Import | Roll Group Summary Report | Tutor Group Summary Report

Import File: Choose File | No file chosen | Upload

New Students ▼ | Roll Groups ▼ | Tutor Groups ▼ | Go

Pending for Submit Promotion!

Year Group	Roll Group	Tutor Group	House	Student Name	Next Year Year Group	Next Year Roll Group	Next Year Tutor Group	Next Year House	Exit Date	Repeat
Current School Year: 16/17										
Y01				ABEL000006s, ABEL000006p	Y01 ▼	01.1 ▼	▼	▼		☐
Y01				BAIL000105s, BAIL000105p	Y01 ▼	▼	▼	▼		☐
Y01				BALA000042s, BALA000042p	Y01 ▼	▼	▼	▼		☐

Existing Student

It is suggested to input data per year. If you have batch assigned groups to existing students in previous screen, you will see the default settings there and you can edit the settings for individual.

Year End Promotion

Task List | Bulk Promotion | **Individual Promotion** | Submit Promotion

Year End Promotion > **Individual Promotion**

Export For Import | Roll Group Summary Report | Tutor Group Summary Report

Import File: Choose File | No file chosen | Upload

Y05 ▼ | Roll Groups ▼ | Tutor Groups ▼ | Go

Pending for Submit Promotion!

Year Group	Roll Group	Tutor Group	House	Student Name		Next Year Year Group	Next Year Roll Group	Next Year Tutor Group	Next Year House	Exit Date	Repeat
Current School Year: 16/17											
Y02	02.1		BLUE	BARR000049s, BARR000049p	🗒	Y02 ▼	▼	▼	BLUE ▼	23/06/2017	☐
Y02	02.1		GREN	BARR000051s, BARR000051p		Y03 ▼	▼	▼	GREN ▼		☐
Y02	02.1		YELL	CASS000013s, CASS000013p		Y03 ▼	▼	▼	YELL ▼		☐
Y02	02.1		GREN	CHAN003805s, CHAN003805p		Y03 ▼	▼	▼	GREN ▼		☐

Leave Student

Gateway will auto fill out the exit date as end of school year for the graduation year students, i.e. K2, Y6, Y13, and it will skip Y6 for through schools. You may input the exit date for other leave students in other year groups. For leave students, please remain their next year group unchanged as a record of their leave year, and empty their next year roll group, tutor group and house. Please refer to the first student **ABAG00002s** in the above screenshot.

Repeated Student

For deferred/repeated student, e.g. student who will repeat his Year 6, you may tick the repeat check box, it will clear the exit date (if there is any), and auto pre-fill the next groups, please update the groups accordingly.

Year Group	Roll Group	Tutor Group	House	Student Name		Next Year Year Group	Next Year Roll Group	Next Year Tutor Group	Next Year House	Exit Date	Repeat
Current School Year: 16/17											
Y02	02.1		BLUE	BARR000049s, BARR000049p		Y02 ▼	▼	▼	BLUE ▼	23/06/2017	☐
Y02	02.1		GREN	BARR000051s, BARR000051p		Y02 ▼	▼	▼	GREN ▼	23/06/2017	☐
Y02	02.1		YELL	CASS000013s, CASS000013p		Y02 ▼	▼	▼	YELL ▼		☑

Export for Import

You may download the student template and import the whole school student promotion info.

5) VERIFY BY SUMMARY REPORT

After update the students' next year roll group (and/or tutor group), you might run the summary report by roll group, summary report by tutor group (if applicable) for an overview. SLT, Teachers might not access this page, they may run the same reports #901/#902 in Report Centre, and then adjust the settings if necessary.

Gateway Report Centre > (901) Roll Group Summary Report (/w Next Year)

🖨 Print

Current Academic Year (17/18)
Not yet assigned Roll Group for current year: 0
EAL Referral Low Moderate Intensive None
monitoring LoA 1 LoA 2 LoA 3/4 LoA 5/6

Next Academic Year
Not yet assigned Roll Group for next year: 0

Y07

Roll Group	No. of Stud.	Age	M	F	House	SEN	EAL	✚
07F	1	12.5	0	1	F X1	0	0	0
07W	1	12.0	0	1	W X1	0	0	0
Sub-Total	2		0	2	2	0	0	0

Y07

Roll Group	No. of Stud.	Age	M	F	House	SEN	EAL	✚
07F	31	11.7	15	16	F X31	X2 X1 X1	X2 X4 X5	4
07W	31	11.7	17	14	W X31	X1 X4 X2	X2 X5	6
07D	31	11.7	15	16	D X31	X5 X2	X2 X1 X5 X1	5
07E	30	11.7	15	15	E X30	X3 X1 X1	X1 X6	9
07N	31	11.9	15	16	N X31	X5 X1 X1	X4 X2 X1	2
07R	30	11.8	16	14	R X30	X6 X2 X1	X2 X7	4
Sub-Total	184		93	91	184	39	50	30

Y08

Roll Group	No. of Stud.	Age	M	F	House	SEN	EAL	✚
08D	31	11.7	15	16	D X31	X5 X2	X2 X1 X5 X1	5
08E	30	11.7	15	15	E X30	X3 X1 X1	X1 X6	9
08F	30	11.7	15	15	F X30	X2 X1 X1	X2 X4 X5	4
08N	31	11.9	15	16	N X31	X5 X1 X1	X4 X2 X1	2
08R	30	11.8	16	14	R X30	X6 X2 X1	X2 X7	4
08W	30	11.7	17	13	W X30	X1 X4 X2	X2 X5	6
Sub-Total	182		93	89	182	39	50	30

Y08

Roll Group	No. of Stud.	Age	M	F	House	SEN	EAL	✚
08D	31	12.7	16	15	D X31	X5 X3	X1	7

Y09

Roll Group	No. of Stud.	Age	M	F	House	SEN	EAL	✚
09D	31	12.7	16	15	D X31	X5 X3	X1	7

6) CONFIRM AND SUBMIT PROMOTION

After complete inputting all promotion data, you may submit and then wait for Gateway Year Start to have the student promotion go live in Gateway.

Please confirm the data input is completed and correct for all year levels by click the Confirm link:

Task List	Bulk Promotion	Individual Promotion	**Submit Promotion**

Year End Promotion > **Submit Promotion**

This process is to submit the final settings for next year Roll Group / Tutor Group / House setup before ESF Centre process the Gateway Year Start for your school. Please click Confirm on each year group, it will open up the student list for you to double check to confirm.

You may submit the confirmed promotion data after Year End and before Gateway Year Start.

Roll Group Summary Report | Tutor Group Summary Report

Year Group (16/17)	Confirmation Date	Confirmed By	Status	Action
New Student				[Confirm]
Y01				[Confirm]
Y02				[Confirm]
Y03				[Confirm]

Click on the Confirm links to pop up the student list for new student and existing all year groups students, it will high light the record(s) in red if there is anything missed, see the below sample screen.

Year Group Confirmation

Student Name △	Year Group	Roll Group	Tutor Group	House	Exit Date
AGIU000003s, AGIU000003p	Y01 -> Y01	01.1 -> 01.1	->	RED -> RED	23/06/2017
ANGE000004s, ANGE000004p	Y01 -> Y02	01.1 ->	->	GREN -> GREN	
BHAV000027s, BHAV000027p	Y01 -> Y02	01.1 -> 02.4	->	RED -> RED	
CHOI000512s, CHOI000512p	Y01 -> Y02	01.1 -> 02.4	->	YELL -> YELL	
DEJA000004s, DEJA000004p	Y01 -> Y01	01.1 -> 01.1	->	BLUE -> BLUE	23/06/2017
DSOU000034s, DSOU000034p	Y01 -> Y02	01.1 -> 02.4	->	PURP -> PURP	
EDWA000053s, EDWA000053p	Y01 -> Y02	01.1 -> 02.4	->	YELL -> YELL	
LO--000608s, LO--000608p	Y01 -> Y01	01.1 -> 01.1	->	YELL -> YELL	23/06/2017

Confirm   Cancel

You wish to update the data, click Cancel and go back to Individual Student screen to make changes.

After confirmed the promotion data for all year levels, you will be able to submit promotion.

Y05	28/06/2016	Gateway, Support	Confirmed	[Confirm]
Y06	28/06/2016	Gateway, Support	Confirmed	[Confirm]

Submit Promotion

Click the **Submit Promotion** button to proceed. If you use Maze, you will find the data update in Maze next day and wait for Gateway Year Start to update Gateway.

Before Gateway year-start, you may make changes, re-confirm and re-submit the data if necessary. After Gateway year-start, it will update Gateway and further changes should be done in Gateway Student Demographics.

Input Students' next year Year Group, Roll Group, (Tutor Group) & Exit Date for leave students. → Confirm → Submit Promotion → Update Gateway

Gateway Year Start
e.g. end of July