

EOY Management

End-of-Year (EOY) Processing refers to the process in identiMetrics that enables you to modify your data at the end of the year in order to match the promotion and graduation of your students. If you are using the identiMetrics Biometric ID Platform in a school setting then the EOY process will help you manage your data as you move from one school year to the next. EOY processing is optional and can be disabled or enabled at any time using the **Properties** dialog which is available in the **Service Management** sub-menu.

Here's how it works. There are two steps needed to complete your EOY process. The first step is setting up the properties for the school year and you will use the Setup Wizard to help you accomplish it by clicking on the **Setup EOY...** menu item. The second step is running the EOY Process which will modify your data and get you ready to start your next school year. You will use the **Run EOY...** menu item to access the information you need to complete this step. To help you keep track of the EOY steps, you will get reminders to setup your properties (Step 1) until the Setup is completed and you will get reminders at the end of the year until you run the EOY Process (Step 2).

Step 1, you set up your EOY properties using the End-of-Year Setup Wizard. The first time you setup EOY, you will provide the dates your school year starts and ends and the rules needed to modify your data and a few other properties. In subsequent years, you will only need to review your setup and make changes as needed. Review the **EOY Management | Setup EOY...** section below for the details on using the wizard.

The Daily Task (see the [identiMetrics Services Guide](#) document for information on the Daily Task) checks each day to determine if it needs to send EOY notifications or it has to process Start-of-Year (SOY) or EOY activities. When the SOY date is reached, the Daily Task will enable the **Scheduled Import – Run?** option (if the user hasn't turned it off) and when the EOY date is reached it will disable this option. After the EOY date, you will be ready for Step 2.

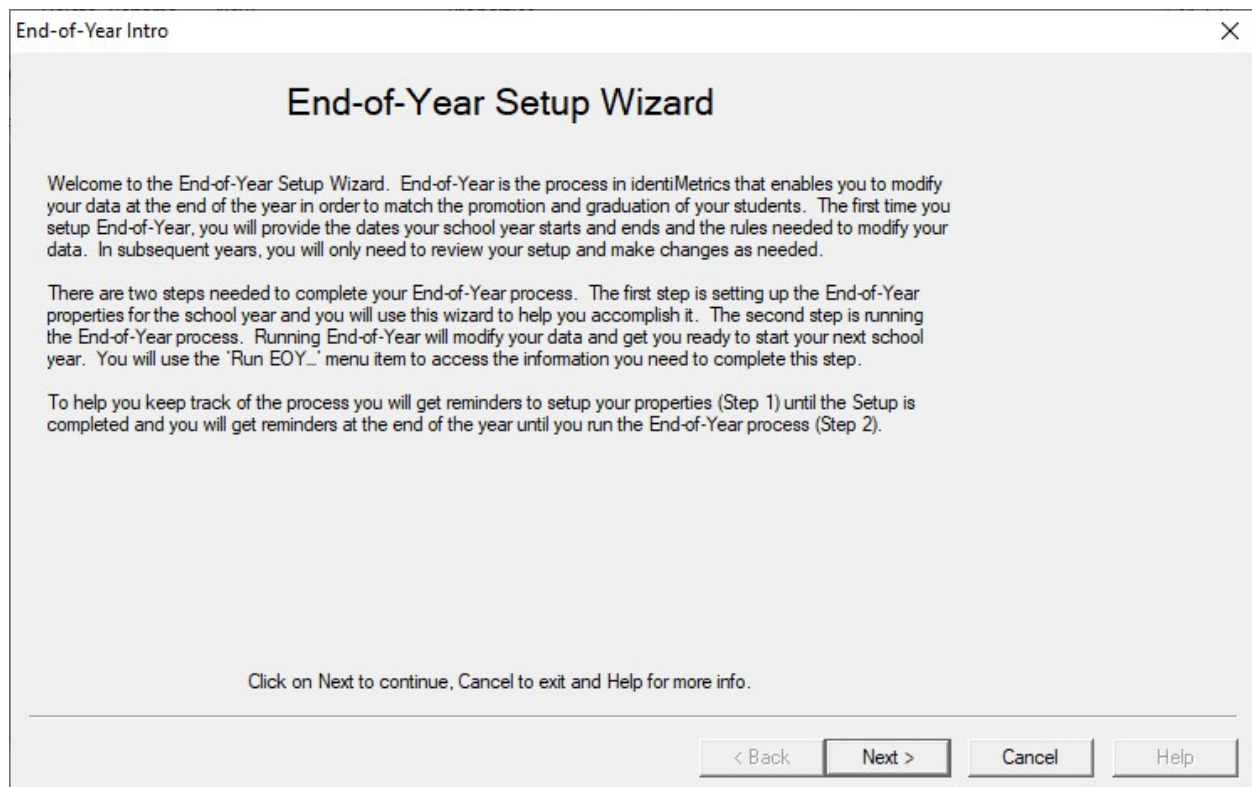
Step 2, at the end of your school year you have to run the EOY Process to modify the identiMetrics database using the rules you set up in the EOY Setup Wizard. You can run it manually by opening the **Run EOY...** dialog and clicking on the **Run** button (If the button is disabled, it means you have not reached your EOY date). If it is not run manually and you have set your properties to do so, it will be run automatically.

When EOY is run, whether you run it manually or it is run automatically, it will take a backup of your database, it will modify the data according to the rules, it will save this year's EOY properties and create a new school year. You will be reminded to review the new year's properties until you click on Finish at the end of the EOY Setup Wizard.

EOY Management | Setup EOY...

This menu item is only available when connected to a Distributor or to a Biometric Engine that is not Distributor enabled and when the user's role is Administrator or Manager.

Selecting this item will display the **End-of-Year Setup Wizard**. The introduction page is first and looks like this the first time you set up your properties. It gives you an overview of the EOY process.



In subsequent years, the introduction page looks like this. It indicates that you have previously set up your properties and that you need to simply review and confirm your properties for the new year. It also tells you what user took the EOY actions last year.

End-of-Year Intro

End-of-Year Setup Wizard

Welcome back to the End-of-Year Setup Wizard. End-of-Year is the process in identiMetrics that enables you to modify your data after the end of the year in order to match the promotion and graduation of your students. Since you have previously setup your properties, you will only need to step through the wizard and review this year's properties and only make changes as needed.

Previously, Default Admin completed the setup on 09/30/2020 and Default Admin ran the End-of-Year Process on 09/30/2020.

Click on Next to continue, Cancel to exit and Help for more info.

< Back

Next >

Cancel

Help

Click on **Next >** to get started.

SOY Properties

Start-of-Year (SOY) Properties

The first step is to identify the date that your school year will start. Once the school year starts, you will be able to run your Auto Imports.

SOY Date:

This date should be the actual first day of the current school year. If you have already started your school year, then the first day of the current school year would be IN THE PAST.

Remind Me: Days Before SOY Date

Enter the number of days, from 1 to 30, prior to the SOY date that you would like to get a reminder that SOY is approaching. You can set the value to zero if you don't want any reminders but it's not recommended.

Click on Back to go to previous page, Next to continue, Cancel to exit and Help for more info.

< Back

Next >

Cancel

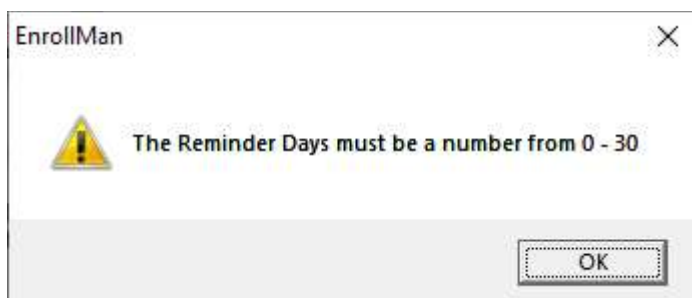
Help

Fill in the SOY date you want then set the 'Remind Me' days to the number of days of warnings you want. If you set the days to 0 then you won't receive any warnings.

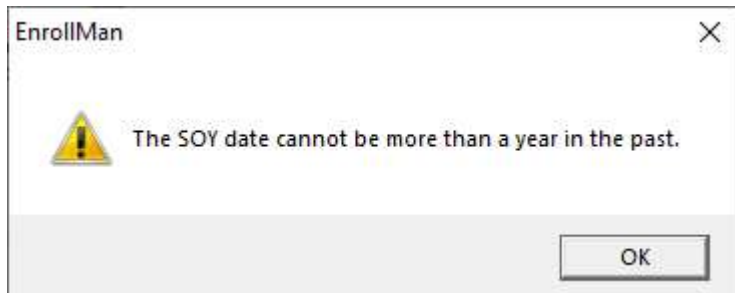
To set the date you can type the date, use the up and down arrows to change the individual month, day or year or click on the dropdown box and pick the date using the calendar.



You can click **< Back** at any time if you need to review or make changes in any of the previous pages. Clicking on **Next >** will cause the wizard to check the values you entered. If everything is okay, then it will take you to the next page. If there are any issues, it will provide a message. Here are a few situations that the SOY page will flag.

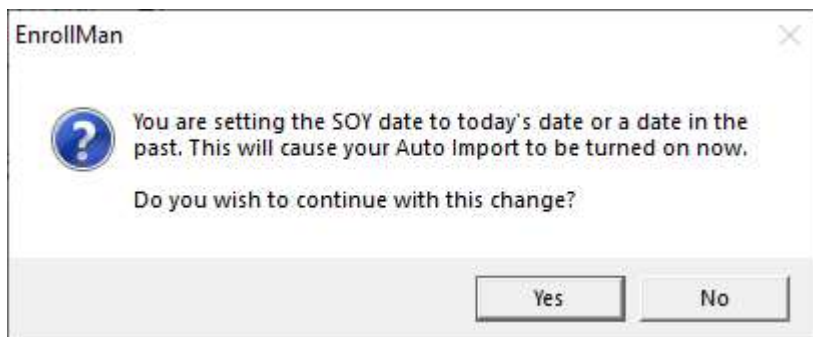


The Remind Me days must be valid.



The SOY date can't be more than a year old.

This notice just lets you know that by using the date you've entered, it will run the activities associated with the SOY as soon as the wizard is finished.



This notice lets you know that by changing the date to one in future once you've already passed SOY, will undo the activities associated with the SOY as soon as the wizard is finished.

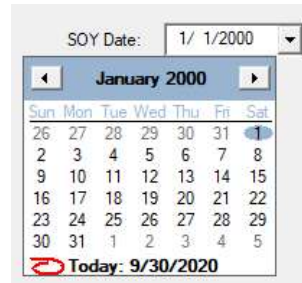


Choosing **Yes** will continue to the next page. Choosing **No** will stay on the same page and allow you to make more changes.

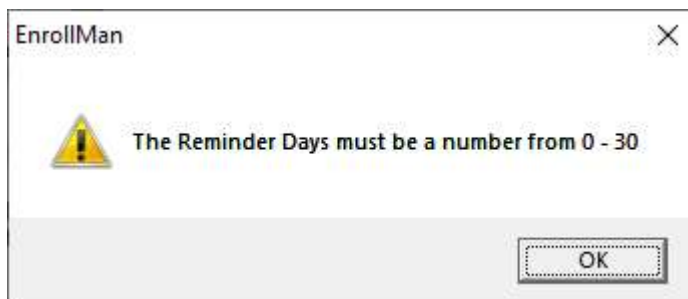
A window titled "EOY Properties" with a close button (X) in the top right corner. The main heading is "End-of-Year (EOY) Properties". Below this is a paragraph: "The next step is to identify the date that your school year will end. Once the school year ends, the Auto Import will be turned off until the next school year starts." Below the paragraph is a label "EOY Date:" followed by a date picker showing "8/29/2020" with a dropdown arrow. Another paragraph follows: "This date should be the actual last day of your school year and cannot be in the past. This will be the date when you will be able to run the EOY process." Below this is a label "Remind Me:" followed by a text input field containing the number "7" and the text "Days Before EOY Date". A final paragraph reads: "Enter the number of days, from 1 to 30, prior to the EOY date that you would like to get a reminder that EOY is approaching. You can set the value to zero if you don't want any reminders but it's not recommended." At the bottom, a line of text says: "Click on Back to go to previous page, Next to continue, Cancel to exit and Help for more info." At the bottom right are four buttons: "< Back", "Next >", "Cancel", and "Help".

Fill in the EOY date you want then set the 'Remind Me' days to the number of days of warnings you want. If you set the days to 0 then you won't receive any warnings.

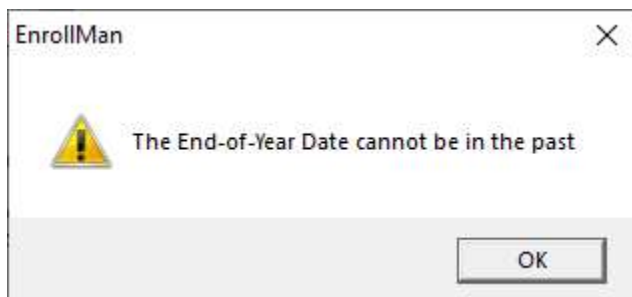
To set the date you can type the date, use the up and down arrows to change the individual month, day or year or click on the dropdown box and pick the date using the calendar.



You can click **< Back** at any time if you need to review or make changes in any of the previous pages. Clicking on **Next >** will cause the wizard to check the values you entered. If everything is okay, then it will take you to the next page. If there are any issues, it will provide a message. Here are a few situations that the EOY page will flag.

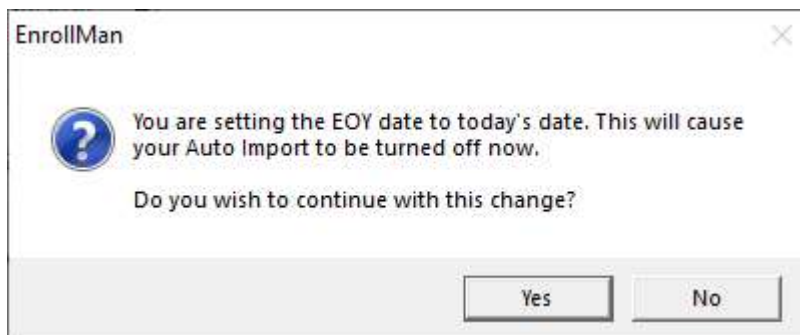


The Remind Me days must be valid.

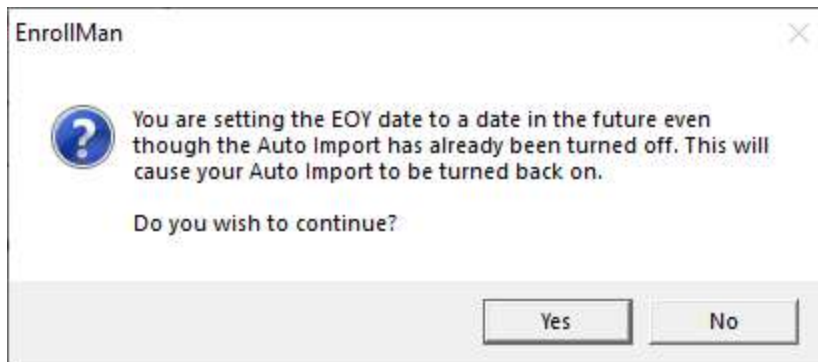


The EOY date can't be in the past.

This notice just lets you know that by using the date you've entered, it will run the activities associated with the EOY as soon as the wizard is finished.



This notice lets you know that by changing the date to one in future once you've already passed EOY, will undo the activities associated with the EOY as soon as the wizard is finished.



Choosing **Yes** will continue to the next page. Choosing **No** will stay on the same page and allow you to make more changes.

Data Modification Rules are used to change your data after the end of the year to reflect the changes to your students as they move to a new grade and possibly a new school or graduate.

Here is how the page looks in the wizard with the key elements highlighted.

When connected to a Distributor

Data Modification Rules

Data Modification Rules

Your identiMetrics software is configured to use Auto Import. The Auto Import will adjust the grade levels and Biometric Engine Names (locations) for your students once run in the new school year. As a result, you only need to setup your rules to delete the highest grade level which will remove your graduating students.

Click on the Help button to get more information about setting up your rules.

Order	From Level One	From Level Two	From Biometric Engine Name	Action	To Level One	To Level Two	To Biometric Engine Name
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Add Delete Refresh

Click on Back to go to previous page, Next to continue, Cancel to exit or Help for more info.

< Back Next > Cancel Help

When connected to a Biometric Engine

Data Modification Rules

Data Modification Rules

Your identiMetrics software is configured to use Auto Import. The Auto Import will adjust the grade levels for your students once run in the new school year. As a result, you only need to setup your rules to delete the highest grade level which will remove your graduating students.

Click on the Help button to get more information about setting up your rules.

Order	From Level One	From Level Two	Action	To Level One	To Level Two
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Add Delete Refresh

Click on Back to go to previous page, Next to continue, Cancel to exit or Help for more info.

< Back Next > Cancel Help

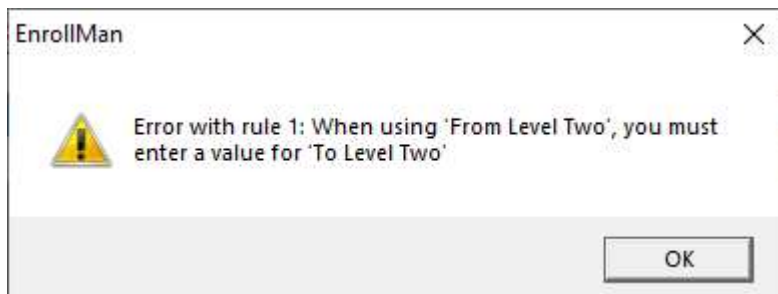
- The **Add** button allows you to create a new rule.
- The **Delete** button allows you to delete a rule.
- The **Refresh** button discards ALL changes you've made since opening the wizard.
- The **Order** field specifies the order in which each rule change will be made. The first rule should always start with the highest grade level.
- The **From Level Columns** specify which of the current records the rule applies to.
- The **Action** field specifies what is to be done with those records. On a Distributor you can specify **Rename** or **Delete**. On a Biometric Engine you can also specify **Transfer**.
 - When the **Action** is **Rename** then the **To Level Columns** specify the new values for the Level One or Level Two values specified in the **From Level Columns**.
 - When the **Action** is **Delete** then the **To Level Columns** are not used.
 - When the **Action** is **Transfer** then the records will be removed from the database and saved to a file. This file will be created in the *Transfers* folder in the installation path. The default path is *C:\Users\Public\Documents\idenMetrics\Transfers*. The file will be named as follows: 'EOY'; the value of **From Level One**; the value of **From Level Two** and the date. An example would be *EOY-11-12-052216.xfr*.
- The **To Level Columns** have to match the **From Level Columns**. So, if there is a value in **From Level One**, there must be a different value in **To Level One**. The same is true for **From Level Two** and when on a Distributor the same is true for the **From Biometric Engine Name** columns.

You can click **< Back** at any time if you need to review or make changes in any of the previous pages. Clicking on **Next >** will cause the wizard to check the values you entered. If everything is okay, then it will take you to the next page. If there are any issues, it will provide a message. Here are the error conditions that will be reported:

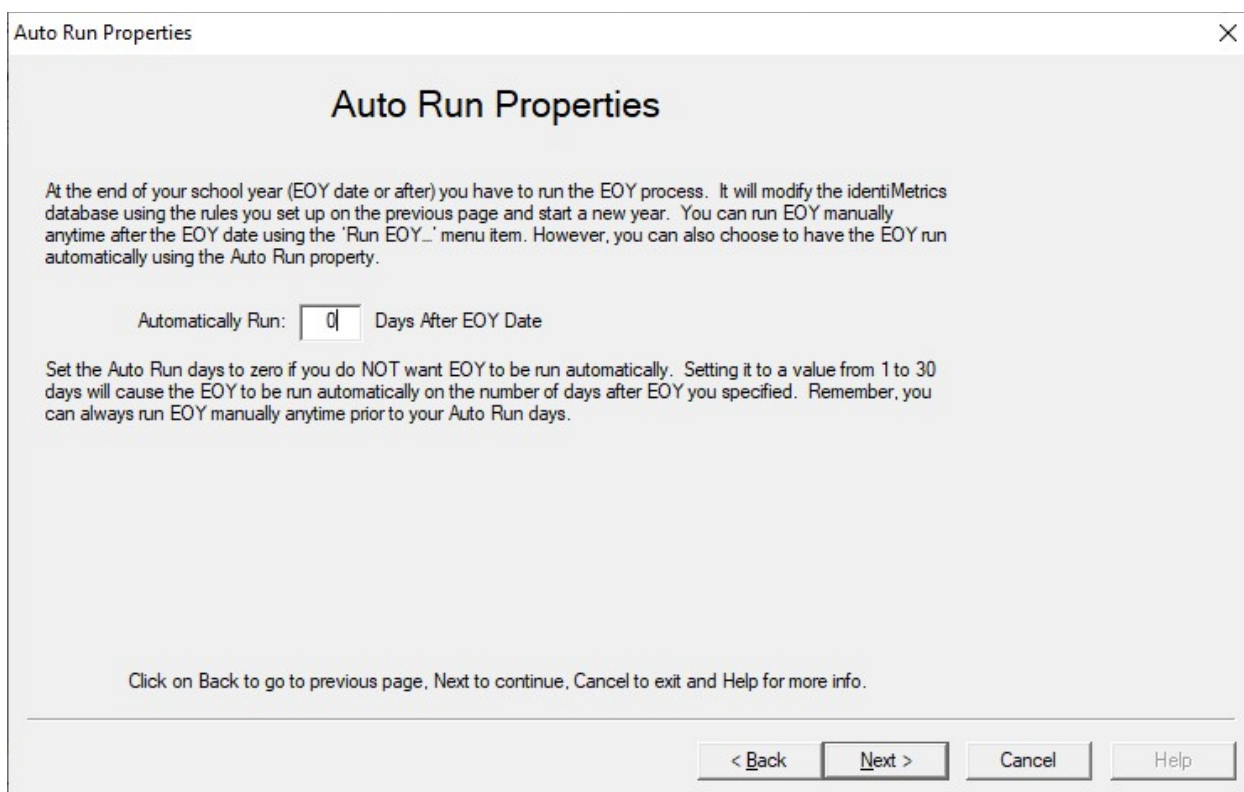
- **Delete and Transfer Actions**
 - 'From' and 'To' values for 'Biometric Engine Name' must be empty when using Delete
 - The 'To' values must be empty when using Delete or Transfer
- **Rename Action**
 - 'From' and 'To' values for 'Level One' must be different
 - When using 'From Level One', you must enter a value for 'To Level One'
 - When using 'To Level One', you must enter a value for 'From Level One'
 - 'From' and 'To' values for 'Level Two' must be different
 - When using 'From Level Two', you must enter a value for 'To Level Two'
 - When using 'To Level Two', you must enter a value for 'From Level Two'
 - 'From' and 'To' values for 'Biometric Engine Name' must be different

- When using 'From Biometric Engine Name', you must enter a value for 'To Biometric Engine Name'
- When using 'To Biometric Engine Name', you must enter a value for 'From Biometric Engine Name'
- You must enter a value for at least one of the 'From' fields

Here's an example of an error message.

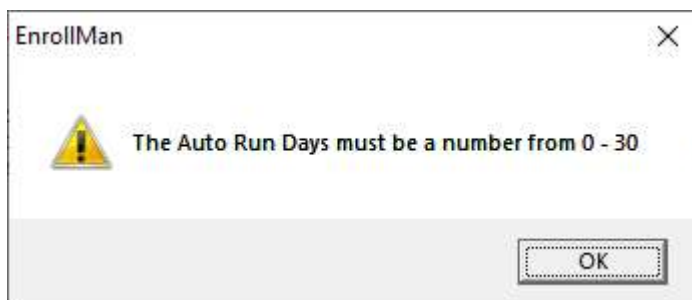


Clicking **OK** will clear the message and allow you to correct the error. Once all the errors are corrected, clicking the **Next >** button will move you to the next page.



Auto Run provides a way to tell identiMetrics that you want the EOY Process to run automatically on a certain number of days after EOY. You can set this property to a smaller value because you want the software to take care of the processing or you can set it to a larger number and use it as a precaution in case you forget. You can also leave it as zero if you always want to run the process manually.

Set the value and click on **Next >** to continue to the next page. The value must be between 0 and 30.



Finish End-of-Year Setup

Review and Save Properties

Please review all of your property settings. If everything is correct, click the Finish button to save your changes and exit. If you need to make a change, click the Back button to go to the appropriate page to make them there.

SOY

Date: 8/17/2020

Remind Me: 7 Days Before

EOY

Date: 5/ 2/2021

Remind Me: 7 Days Before

Automatically 0 Days After

Order	From Level One	From Level Two	Action	To Level One	To Level Two
1		12	Delete		
2		11	Rename		12

Click on Finish to save your settings, Back to go to previous page, Cancel to exit or Help for more info.

< Back Finish Cancel Help

The Finish page lets you see all of your properties at the same time so you can review them. If you need to make changes, simply use the **< Back** button to return to the appropriate page and make your changes. If you have made any changes or if you just completed a review of the new year's properties then the Finish button will be enabled. To save your changes, confirm your properties and exit the wizard, click on the **Finish** button. The wizard will now check all of your settings to make sure everything is valid. At this time, the only error that may be found is when the SOY and EOY dates are too far apart.



If you get an error, go back and fix one or both of the dates and then try again. If everything is valid, then your EOY is set up. If you were getting 'set up' reminders they will no longer be displayed.

If the Finish button is not enabled, you have nothing to save and you can click on **Cancel** to exit the wizard.

Data Modification Rule Examples

When Using Auto Import

When you are using Auto Import it is responsible for making most of the changes to your enrollment data. This includes changing grade and, when using a Distributor, school information. In this case the only thing the EOY process has to handle is the graduating class. You can either use the Rename action or the Delete action depending on your preference.

Here is a Distributor example:

Data Modification Rules

Your identiMetrics software is configured to use Auto Import. The Auto Import will adjust the grade levels and Biometric Engine Names (locations) for your students once run in the new school year. As a result, you only need to setup your rules to delete the highest grade level which will remove your graduating students.

Click on the Help button to get more information about setting up your rules.

Order	From Level One	From Level Two	From Biometric Engine Name	Action	To Level One	To Level Two	To Biometric Engine Name
1		12		Delete			

Buttons: Add, Delete, Refresh

Click on Back to go to previous page, Next to continue, Cancel to exit or Help for more info.

Navigation: < Back, Next >, Cancel, Help

The Biometric Engine example is basically the same except here I'm using the Rename action.

Data Modification Rules

Data Modification Rules

Your identiMetrics software is configured to use Auto Import. The Auto Import will adjust the grade levels for your students once run in the new school year. As a result, you only need to setup your rules to delete the highest grade level which will remove your graduating students.

Click on the Help button to get more information about setting up your rules.

Order	From Level One	From Level Two	Action	To Level One	To Level Two
1		12	Rename		Graduates

Add
Delete
Refresh

Click on Back to go to previous page, Next to continue, Cancel to exit or Help for more info.

< Back

Next >

Cancel

Help

When NOT Using Auto Import

When you're not using an import to manage all of the promotion changes then the rules will do all of the work.

Here is a Distributor example that will ‘promote’ the students in a middle school and a high school.

Data Modification Rules
✕

Data Modification Rules

Your identiMetrics software is configured to use either a manual import or no import. Set up your rules to change each grade level and Biometric Engine Names (locations) to the next higher one for your promotions and to delete or transfer the level that is no longer in this school.

Click on the Help button to get more information about setting up your rules.

Order	From Level One	From Level Two	From Biometric Engine Name	Action	To Level One	To Level Two	To Biometric Engine Name
1		12		Delete			
2		11		Rename		12	
3		10		Rename		11	
4		09		Rename		10	
5		08	BEService-2	Rename		09	BEService-3

Add
Delete
Refresh

Click on Back to go to previous page, Next to continue, Cancel to exit or Help for more info.

< Back
Next >
Cancel
Help

By scrolling down you can see the rules that affect the middle school.

Data Modification Rules
✕

Data Modification Rules

Your identiMetrics software is configured to use either a manual import or no import. Set up your rules to change each grade level and Biometric Engine Names (locations) to the next higher one for your promotions and to delete or transfer the level that is no longer in this school.

Click on the Help button to get more information about setting up your rules.

Order	From Level One	From Level Two	From Biometric Engine Name	Action	To Level One	To Level Two	To Biometric Engine Name
3		10		Rename		11	
4		09		Rename		10	
5		08	BEService-2	Rename		09	BEService-3
6		07		Rename		08	
7		06		Rename		07	

Add
Delete
Refresh

Click on Back to go to previous page, Next to continue, Cancel to exit or Help for more info.

< Back
Next >
Cancel
Help

If you're using a Biometric Engine at your high school your rules could look like this.

Data Modification Rules
✕

Data Modification Rules

Your identiMetrics software is configured to use either a manual import or no import. Set up your rules to change each grade level to the next higher one for your promotions and to delete or transfer the level that is no longer in this school.

Click on the Help button to get more information about setting up your rules.

Order	From Level One	From Level Two	Action	To Level One	To Level Two
1		12	Delete ▼		
2		11	Rename ▼		12
3		10	Rename ▼		11
4		09	Rename ▼		10

Add Delete Refresh

Click on Back to go to previous page, Next to continue, Cancel to exit or Help for more info.

< Back Next > Cancel Help

If you had a Biometric Engine at your middle school as well, you could use these rules to 'promote' the 6th and 7th graders and to transfer the 8th graders so you can merge them at the high school.

Data Modification Rules
✕

Data Modification Rules

Your identiMetrics software is configured to use either a manual import or no import. Set up your rules to change each grade level to the next higher one for your promotions and to delete or transfer the level that is no longer in this school.

Click on the Help button to get more information about setting up your rules.

Order	From Level One	From Level Two	Action	To Level One	To Level Two
1		08	Rename ▼		09
2		09	Transfer ▼		
3		07	Rename ▼		08
4		06	Rename ▼		07

Add Delete Refresh

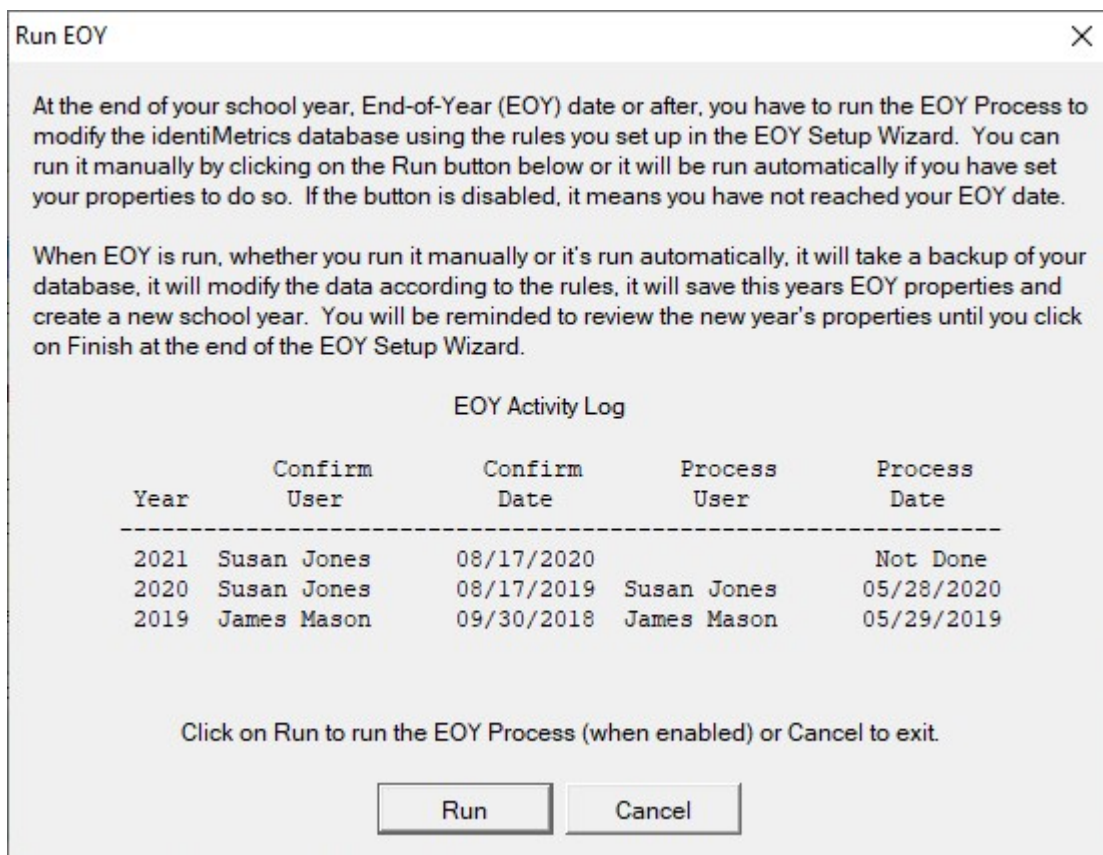
Click on Back to go to previous page, Next to continue, Cancel to exit or Help for more info.

< Back Next > Cancel Help

EOY Management | Run EOY...

This menu item is only available when connected to a Biometric Engine or a Distributor and when the user's role is Administrator or Manager.

The **Run EOY** dialog provides an overview about your EOY Process, shows you some history of the EOY being set up and run, and provides access to the **Run** button. The **Run** button is disabled until the EOY date is reached and then will be available until the EOY Process is run manually by clicking on the **Run** button or automatically by the Daily Task when Auto Run is set.



Run EOY

At the end of your school year, End-of-Year (EOY) date or after, you have to run the EOY Process to modify the identiMetrics database using the rules you set up in the EOY Setup Wizard. You can run it manually by clicking on the Run button below or it will be run automatically if you have set your properties to do so. If the button is disabled, it means you have not reached your EOY date.

When EOY is run, whether you run it manually or it's run automatically, it will take a backup of your database, it will modify the data according to the rules, it will save this years EOY properties and create a new school year. You will be reminded to review the new year's properties until you click on Finish at the end of the EOY Setup Wizard.

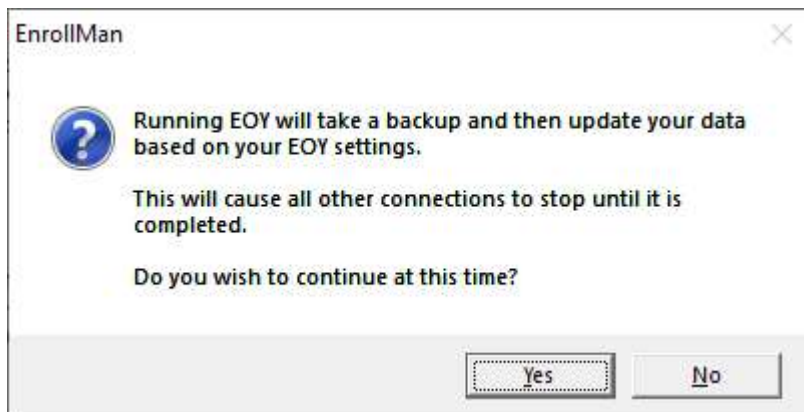
EOY Activity Log

Year	Confirm User	Confirm Date	Process User	Process Date
2021	Susan Jones	08/17/2020		Not Done
2020	Susan Jones	08/17/2019	Susan Jones	05/28/2020
2019	James Mason	09/30/2018	James Mason	05/29/2019

Click on Run to run the EOY Process (when enabled) or Cancel to exit.

Run Cancel

Click the Run button to run the EOY Process. You will be presented with this safety warning. Choose **Yes** to continue. Choosing **No** will return to the Run EOY dialog.



EnrollMan

 Running EOY will take a backup and then update your data based on your EOY settings.

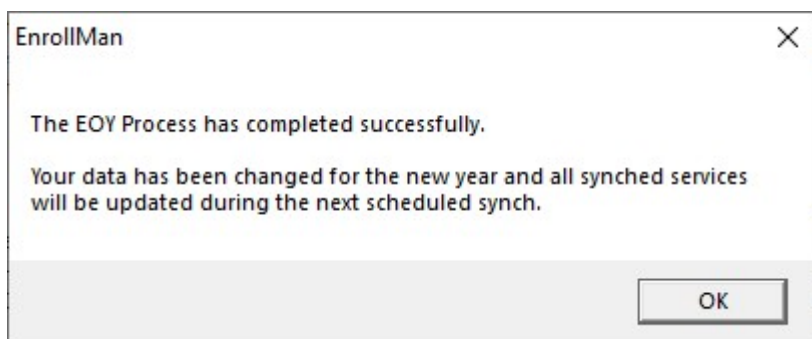
This will cause all other connections to stop until it is completed.

Do you wish to continue at this time?

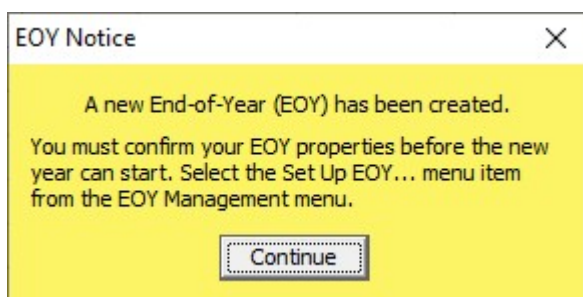
Yes No

The service will create a backup folder called *Backup.BeforeEoyProcessing* in the folder you have specified in the **Requested Backup Folder** option, it will update the data based on the modification rules and it will create a new EOY year.

Once the processing has completed you will see the confirmation message. Click on **OK** to continue.



Next you will be reminded that there is a new year and it must be reviewed before your new SOY date can be processed.

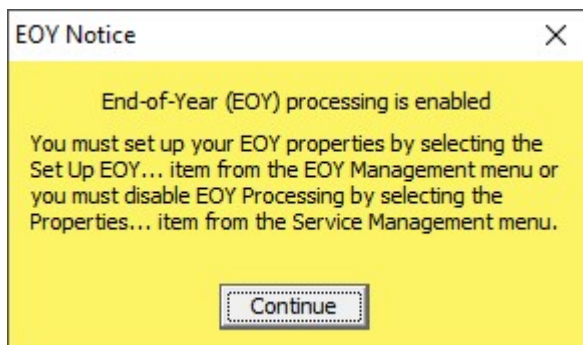


Click on **Continue** and the Enrollment grid will be refreshed to show the results of your changes.

EOY Notifications

Once EOY Processing has been enabled, the Enrollment Manager will keep track of the various EOY dates and provide you with reminder notifications. Here are the notifications that you will see after logging in.

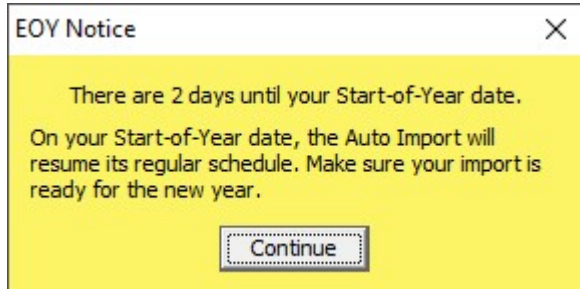
After enabling EOY and prior to setting up your EOY properties you will see this notice.



After the EOY properties have been setup, these notifications will be displayed in the appropriate dates surrounding your SOY and EOY dates.

When Auto Import is On

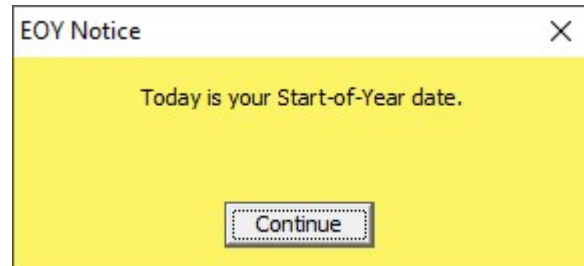
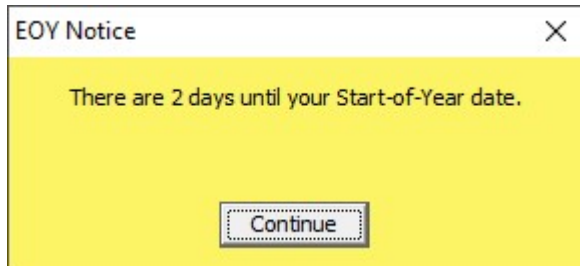
The SOY Date is Approaching



The SOY Date is Today

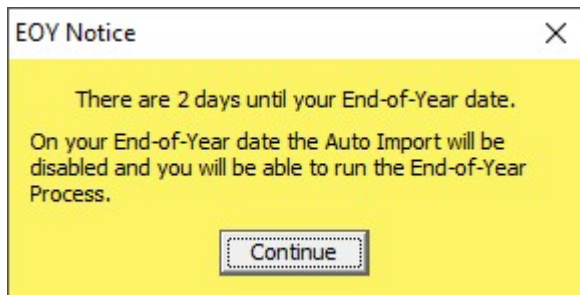


When Auto Import is Off

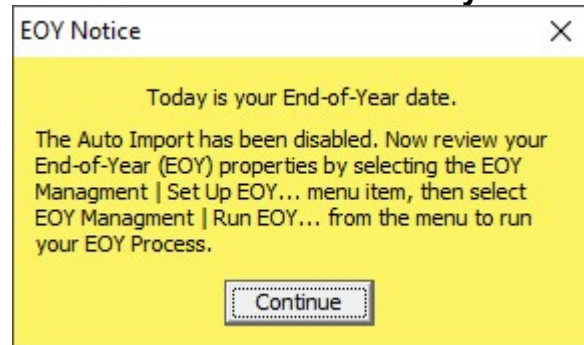


When Auto Import is On

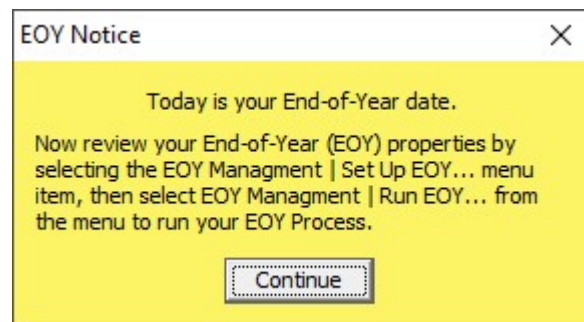
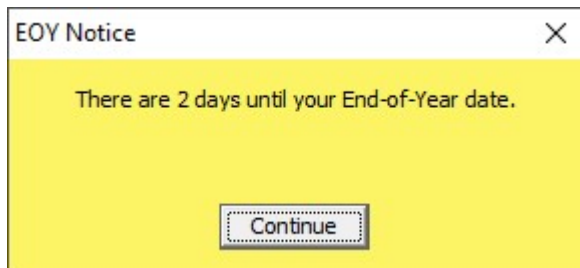
The EOY Date is Approaching



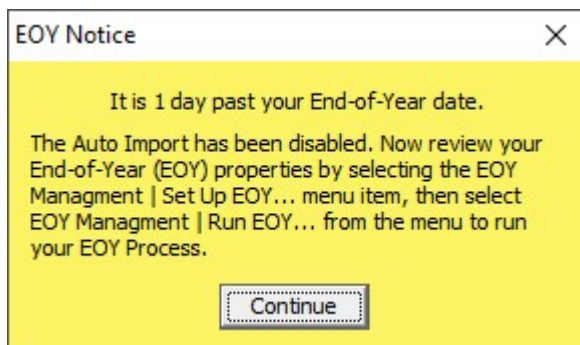
The EOY Date is Today



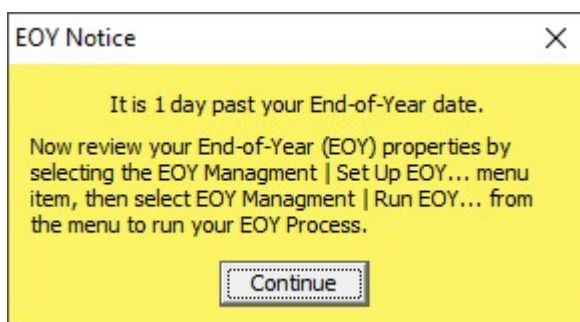
When Auto Import is Off



When Auto Import is On The EOY Date has Passed



When Auto Import is Off



If you have set the Auto Run property, then you will also see a notice letting you know that the day that the EOY Process will be run automatically is approaching.

