How to Process End-of-Year (EOY):
All data contained within the Distributor

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End-of-Year (EOY) processing refers to the process of 'promoting' students from one grade to the next.

You will need an Administrator or Manager role for your User account to run EOY. For more info on User accounts and Roles, check for the Cheat Sheet in the Cheat Sheet section of GOidm.com.

Please Notice This

To proceed with this process you must have <u>version 2.2.7 or greater</u>.

If you do not have this version, email support@identimetrics.net with your current version and we will respond

- If you already set up the EOY process & want to run it, follow the 4 steps below.

- If you are not sure if EOY is set up, check the 4 steps below. If nothing is set up, skip to the next page.

- If you have NOT set up the EOY process, skip to the next page.

**START HERE if you already have EOY set up & want to run it, or you are not sure. Follow the 4 steps below.**

1. Select **Properties** in the **EOY Management** dropdown in the Enrollment Manager on the Distributor.

2. Make sure that the dates are set to reflect the school year's Start and End dates (if you need to change these, follow the steps on Page 3).

3. Check your rules to make sure they are correct and under the correct 'From Level'/'To Level & 'From/To Biometric Engine

NOTE: You may only have one rule if you are using an auto import file.

4. If everything is correct, click on **Apply Rules** in the **EOY Management** dropdown. If you need to make changes or create rules, follow the next several pages for directions.
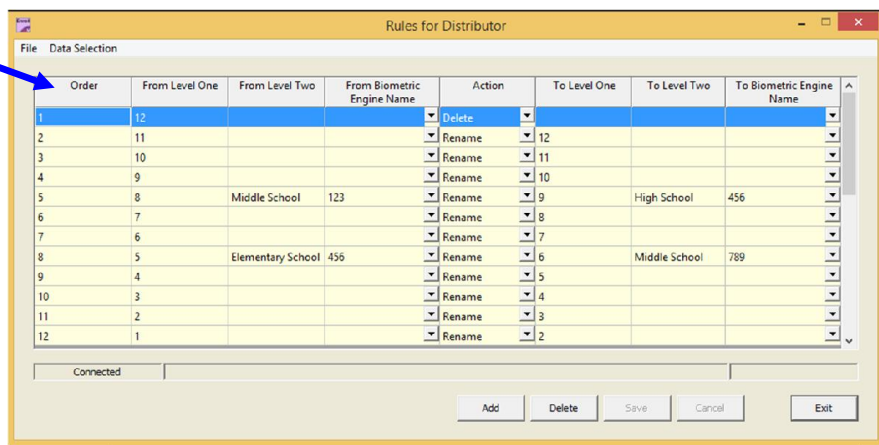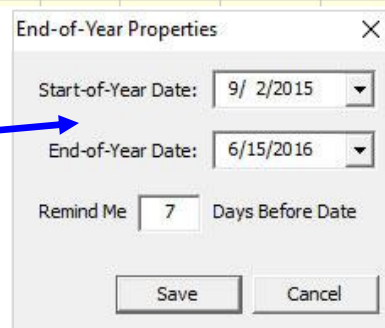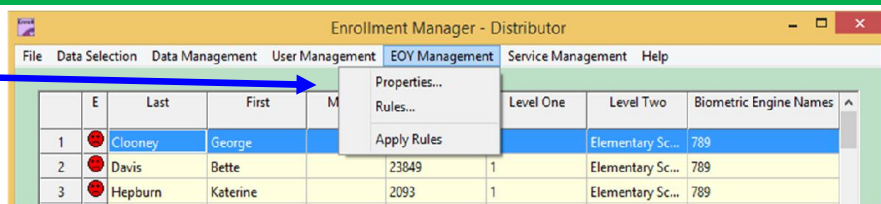
Need assistance? It's easy to get in touch with one of

GO idM.com   support@identimetrics.net   215-836-5640

START HERE if you have NOT set up the EOY process.

You will need an Administrator or Manager role for your User account to run EOY. For more info on User accounts and Roles, check for the Cheat Sheet in the Cheat Sheet section of GOidm.com.

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There are the 4 steps to set up and run the End-of-Year (EOY) process:

1. Turn on End-of Year (EOY) processing

2. Set the properties: Start-of-Year (SOY) and End-of Year (EOY) dates

3. Set the rules

4. Apply the rules

1. Turn on End-of Year (EOY)

- Open the Enrollment Manager, Click on **Service Management** and scroll down to click on **Properties**.

- Find the option called Enable EOY. Make sure the Value is "Yes". (If the value is "No", change it to "Yes" and click on the OK button).

- This is the EOY Notice you will continue to see until you proceed with the following steps .
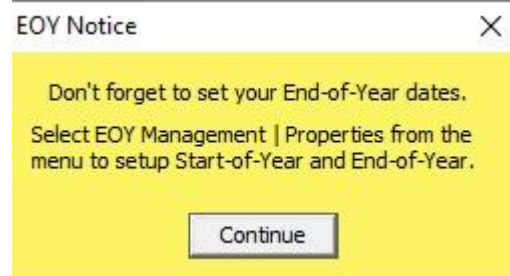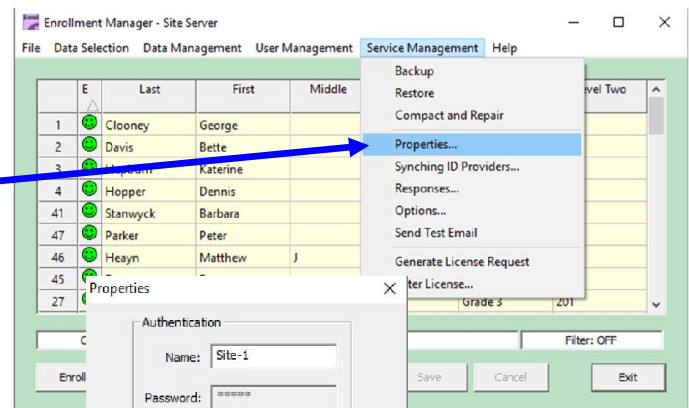
Need assistance? It's easy to get in touch with one of our Biometric Experts!
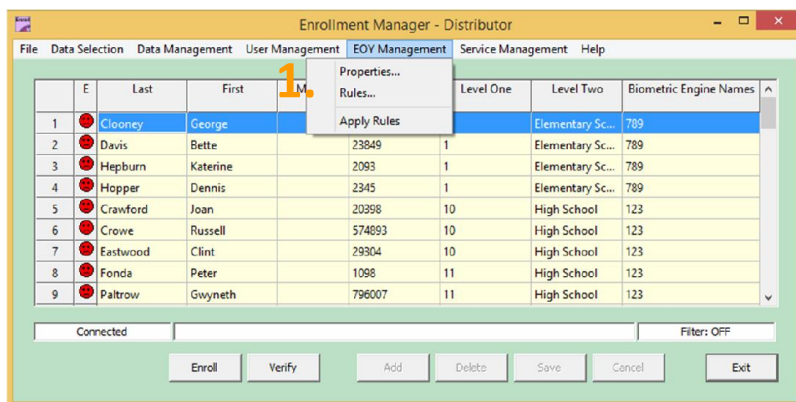
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2. Set the Properties: Start-of-Year (SOY) and End-of Year (EOY)

1. Open the Enrollment Manager, Click on EOY Management and scroll down to click on Properties.

2. Set the Start-of-Year date.

- Definition: The actual first day of the <u>current</u> school year.   So if today is in the month of May of your current school year, the first day of the current school year would be *IN THE PAST*. Feel free to hop in our DeLorean and go "back in time"!

- Importance: The Auto Import feature will reset to Yes. (See page 6 for more info.)

3. Set the End-of-Year date.

- Definition: The actual last day of the <u>current</u> school year. NOTE: This date must be greater than today's date. Get back in the DeLorean and go into the future!

- Importance: The Auto Import feature will turn off after the Rules are applied

- NOTE: The Start-of-Year date and the End-of-Year date change to <u>the following year</u> once the Rules are applied.

4. Set the Remind Me.

- Definition: Reminder notifications activate.

- Importance: Reminds the Administrator when to Apply the Rules for End-of Year.

5. Click Save when finished.

*"Gonna go back in time!"* ♪♪

The system will remind you to Apply the End of Year rules when you log onto the Enrollment Manager. **If you do not log onto the Enrollment Manager every day, set a reminder on YOUR work calendar** (through Outlook, a scheduled email reminder to yourself, on a paper calendar, a large gong, or through your phone's calendar).

Set your personal reminder a few extra days before the beginning of the year – that way if you need help, you can call us.

3. Set the rules

1. Open the Enrollment Manager, Click on EOY Management and scroll down to click on Rules.

2. Click on the **Add** button to create a new rule.

3. The **Order** field specifies the order in which each rule change will be made. ***The first sequence should always start with the highest grade level.***

4. **From Level**—the current records the rule applies to

5. The **Action** field specifies what is to be done with the From Level.

6. **To Level**—the fields that will provide the new value once the action is applied.

- You can specify 'Rename', 'Delete' or 'Transfer'.

7. After adding each rule click on **Save**.

8. When you're finished adding all the rules, click on **Exit**.
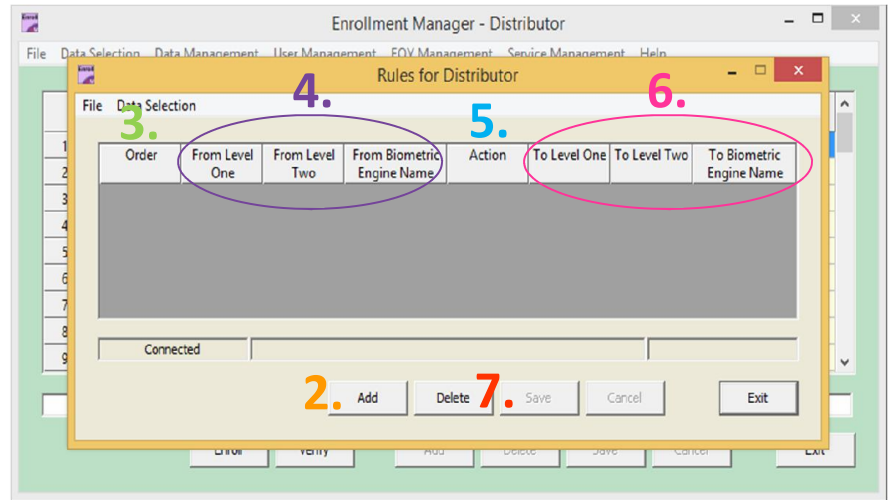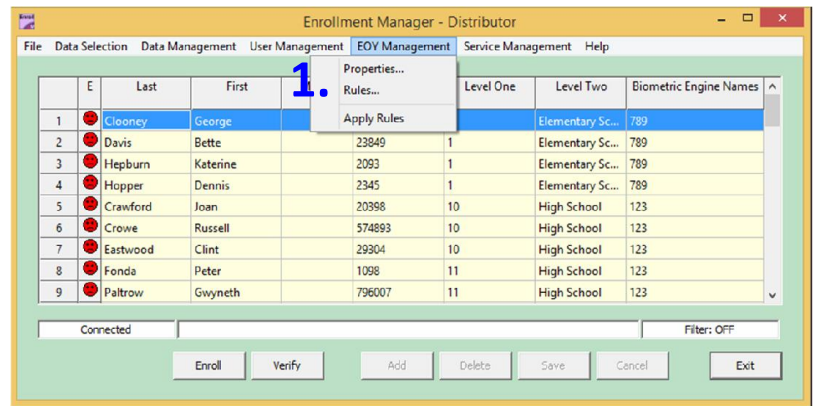
Here is an example that illustrates how a HS 'promotion' might be done.

- Sequence 1, the rule is set to delete any record with a Level One value of '12'.

- Sequence 2, the rule is set to Rename any record with a Level One value of '11' to a value of '12'.

- Sequence 3, the rule is set to Rename any record with a Level One value of '10' to a value of '11'.

- Sequence 4, the rule is set to Rename any record with a Level One value of '09' to a value of '10'.
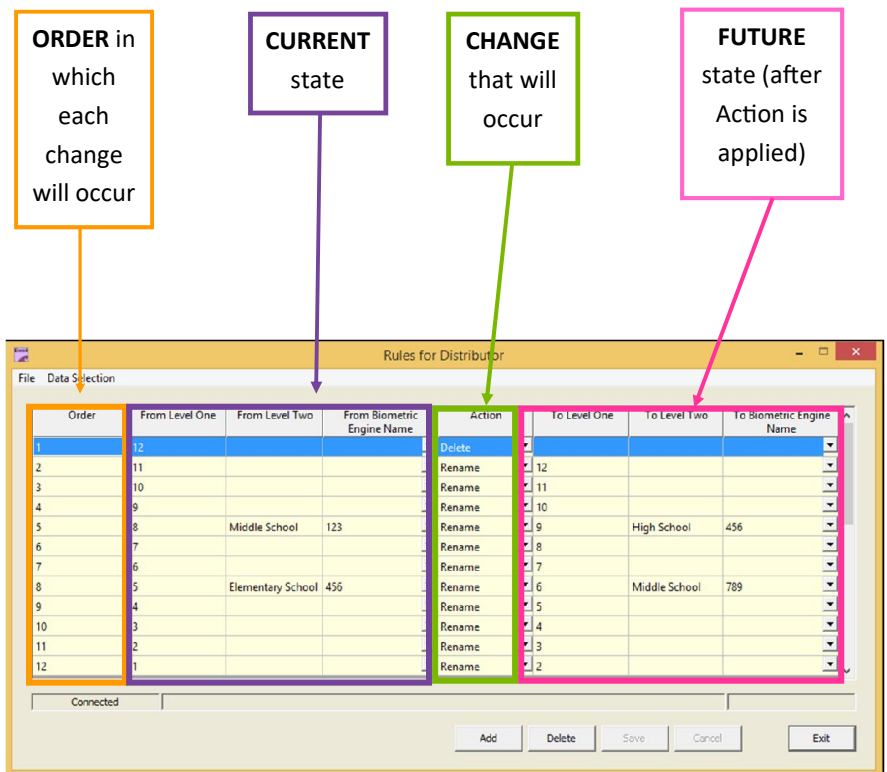
Here is an example that illustrates how a 1 to 12 School 'promotion' might be done.

- Sequence 1, the rule is set to delete any record with a Level One value of '12'.

- Sequence 2, the rule is set to Rename any record with a Level One value of '11' to a value of '12'.

- Sequence 3, the rule is set to Rename any record with a Level One value of '10' to a value of '11'.

- Sequence 4, the rule is set to Rename any record with a Level One value of '9' to a value of '10'.

- Etcetera, etcetera, etcetera, yada, yada, yada...

ORDER in which each change will occur

CURRENT state

CHANGE that will occur

FUTURE state (after Action is applied)

Rules for Distributor

File   Data Selection

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	9			Rename	10		
5	8	Middle School	123	Rename	9	High School	456
6	7			Rename	8		
7	6			Rename	7		
8	5	Elementary School	456	Rename	6	Middle School	789
9	4			Rename	5		
10	3			Rename	4		
11	2			Rename	3		
12	1			Rename	2		

Connected

Add   Delete   Save   Cancel   Exit

4. Apply the rules

Once the End-of Year Properties are set, the Notices activate.

Here is the End-of Year notification. ——————→

End-of-Year Notification

EOY Notice ✕

Today is your End-of-Year date.

Once you have reviewed your rules, select EOY Managment | Apply Rules from the menu to run your End-of-Year processing.
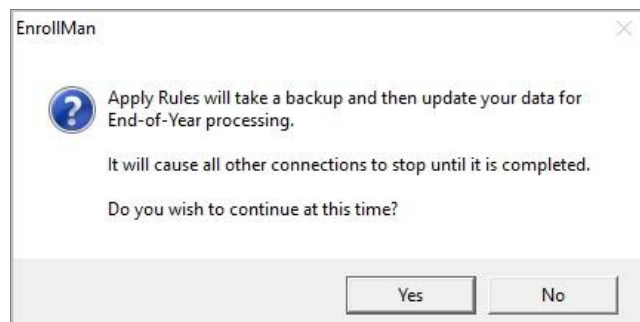
Continue

Once the EOY date has passed you can use the Apply Rules menu item to make all changes happen that are described by the rules to your data.

1. Open the Enrollment Manager that is connected to the Biometric Engine

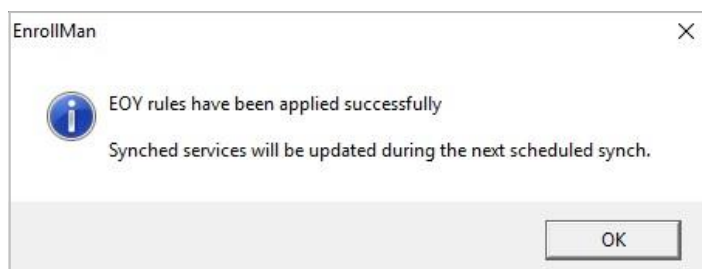2. Click on EOY Management, then scroll down to Apply Rules
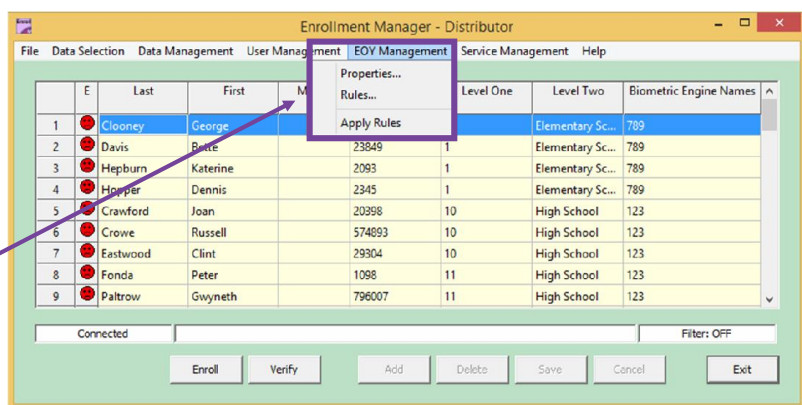
3. You will be asked to confirm your decision. Click on Yes if you want to continue or No to cancel.

EnrollMan ✕

Apply Rules will take a backup and then update your data for End-of-Year processing.

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

Do you wish to continue at this time?

Yes   No

4. When you click on Yes, the server will automatically create a backup folder called Backup.BeforeEoyProcessing then make the changes.

Backup.BeforeEoyProcessing
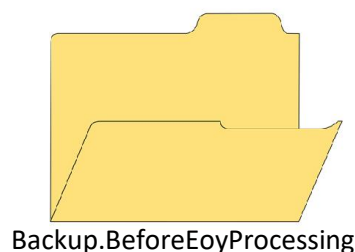
5. Once the processing has completed you will see the confirmation message and the Enrollment grid will be refreshed to show the results of your changes.

EnrollMan ✕

EOY rules have been applied successfully

Synched services will be updated during the next scheduled synch.

OK

- On the SOY date, the server will turn the Auto Import task value back to 'YES' at midnight of your SOY date.

Start-of-Year Notification
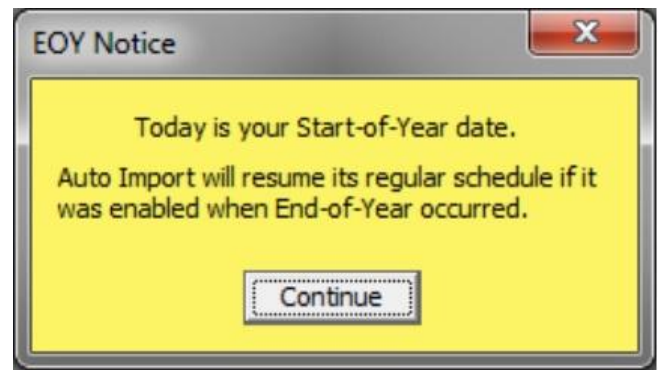
NOTE:

Once the rules have been applied successfully, the End-of-Year and Start-of-Year dates will be updated for the next year.