

# End-of-Year Checklist



identiMetrics™

Cheat Sheet

End-of-Year (EOY) processing refers to the process of ‘promoting’ students from one grade to the next. This is a checklist of information you will need to use the EOY wizard.

NOTE: Your User Role must be Administrator or Manager to run EOY, (for more info on User Roles, check the Cheat Sheet section of GOidm.com.)

Please Notice This



**To proceed with this process you must have version 2.4.0 or greater.**

If you do not have this version, email [support@identimetrics.net](mailto:support@identimetrics.net) for updating instructions.

## 1. Mark down Start-of-Year (SOY) and End-of-Year (EOY) dates

### • Start-of-Year (SOY) date

- Definition: The actual first day of the school year you are ending. 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. *PLEASE NOTE: Remember to check that your import file meets the required specifications. This will ensure your that data will import successfully.*



“Gonna go back in time!”



### • End-of-Year (EOY) date

- Definition: The actual last day of the current school year. NOTE: This date must be today’s date or greater. 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 the following year once the Rules are applied.



Start-of-Year Date	End-of-Year Date

Need assistance? It’s easy to get in touch with one of our Biometric Experts!



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[support@identimetrics.net](mailto:support@identimetrics.net)



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## 2. Refer to your Enrollment Manager grid

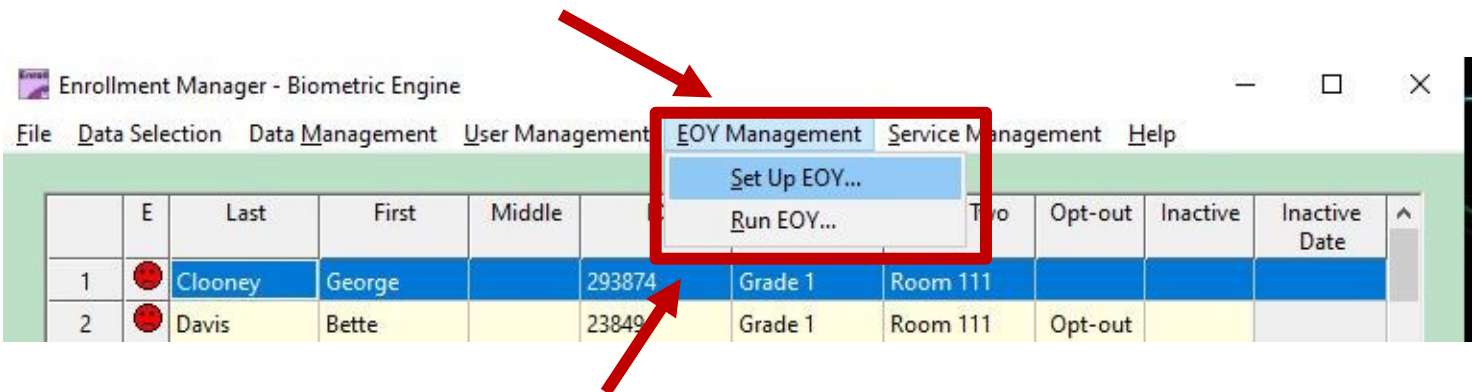
Mark down the column that includes the students grade. Mark down the column that includes the school name or school number. It will be either Level 1 or Level 2.



Level 1	Level 2

## 3. Follow the Wizard

Log into the Enrollment Manager and select EOY Management. Click Set Up EOY and follow the wizard. Please note that the Wizard does not automatically save.



Log into the Enrollment Manager and select Run EOY if you choose to manually run the End-of-Year Process or check out the Bright Idea below.



### Set it and Forget it!

Set your Auto Run Properties to run several days after your EOY date. That way you don't have to log into the program and manually run the EOY process.



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