NEW SCHOOL YEAR SETUP GUIDE

2025/2026

Please log Arbor issues by emailing misadmin@bdcs.org.uk

CONTENTS PAGE

Arbor Support Resources:
- [New School Year Setup Guide from Arbor Help Centre](#)
- [New School Year Setup Steps 1-5 webinar recording and resources (Arbor HQ)](#)
- [New School Year Setup Steps 6-9 webinar recording and resources (Arbor HQ)](#)

STEP 1

Adding Your Next Academic Year

School > School Structure > School Year Setup

School Year Setup

Steps to prepare for the new academic year are locked until the Academic Calendar is filled in and marked as complete.

1. Academic Calendar	Incomplete

- Click on the **1.Academic Calendar** option

Create Academic Year

Academic year name*	2025/2026
Start date ❷	23 Jul 2025
End date* ❷	31st Aug 2026

Cancel **Create Academic Year**

- The start date will already be filled in for you – this is the next day after your previous year.
- Enter your **End Date** as 31st August 2026
- Click on the green **Create Academic Year** button

NOTE: If you have recently migrated from Integris, then the start date will be in July (as shown here). This is an anomaly from the migration. Do not worry too much about this as we will mark the remaining dates in July and August as Holiday.

Setting Up the Academic Calendar (Adding Terms & Holidays)

School > School Structure > School Year Setup > Academic Calendar

Academic Calendar

Academic Year 2025/2026

Academic year name	2025/2026
Dates	01 Sep 2025 - 31 Aug 2026

Terms (2025/2026)   ⊕ Add

No terms have been added for 2025/2026

Holidays (2025/2026)   ⊕ Add

Caution: No holidays have been added for 2025/2026

- Within the Terms area, click on the green **Add** button

- Add in a **Term Name**
- Add in a **Short Term Name**
- Add your **Start Date**
- Add your **End Date**
- Click on the green **Add Term** button

Add Term

Academic Year	2025/2026
Term Name* ❷	Autumn Term
Short Term Name ❷	AUT
Start Date* ❷	1st Sep 2025
End Date* ❷	19th Dec 2025

Cancel   Add Term

- Repeat this process for the **Spring Term** and **Summer Term**

Add Term

Academic Year	2025/2026
Term Name* ❷	Spring Term
Short Term Name ❷	SPR
Start Date* ❷	5th Jan 2026
End Date* ❷	27th Mar 2026

Add Term

Academic Year	2025/2026
Term Name* ❷	Summer Term
Short Term Name ❷	SUM
Start Date* ❷	13th Apr 2026
End Date* ❷	20th Jul 2026

Cancel   Add Term

You will now be left with some dates showing in red, which we will mark as Holidays

Academic Calendar

Academic Year 2025/2026

Academic year name	2025/2026	▶
Dates	01 Sep 2025 - 31 Aug 2026	▶

Terms (2025/2026)   ⊕ Add

Autumn Term	01 Sep 2025 - 19 Dec 2025	▶
Spring Term	05 Jan 2026 - 27 Mar 2026	▶
Summer Term	13 Apr 2026 - 20 Jul 2026	▶

Holidays (2025/2026)   ⊕ Add

Caution: No holidays have been added for 2025/2026

Below is a list of days in the Academic Calendar which are currently unaccounted for.

Add Terms and Holidays to ensure all days are accounted for. Once this is done, you'll be able to review and mark the Academic Calendar as complete.

22 Dec 2025 - 26 Dec 2025
29 Dec 2025 - 02 Jan 2026
30 Mar 2026 - 03 Apr 2026
06 Apr 2026 - 10 Apr 2026
21 Jul 2026 - 24 Jul 2026
27 Jul 2026 - 31 Jul 2026
03 Aug 2026 - 07 Aug 2026
10 Aug 2026 - 14 Aug 2026
17 Aug 2026 - 21 Aug 2026
24 Aug 2026 - 28 Aug 2026
31 Aug 2026

- Within the Holidays area, click on the green **Add** button

- Add in a **Holiday Name**
- Select the **Holiday Type** as **Half Term**
- Add your **Start Date**
- Add your **End Date**
- Click on the green **Add Academic Holiday** button

Add Academic Holiday

Holiday name	Autumn Half Term
Holiday type*	Half-Term
Start date*	27th Oct 2025
End date*	31st Oct 2025

Cancel   Add Academic Holiday

Repeat this process for the **Spring Half Term** and **Summer Half Term**

Add Academic Holiday

Holiday name	Spring Half Term
Holiday type*	Half-Term
Start date*	16th Feb 2026
End date*	20th Feb 2026

Cancel   Add Acade

Add Academic Holiday

Holiday name	Summer Half Term
Holiday type*	Half-Term
Start date*	25th May 2026
End date*	29th May 2026

Cancel   Add Academic Holiday

Next we are going to add in the School Holidays

- Click on the green **Add** button

- Add in a **Holiday Name**
- Select the **Holiday Type** as **Vacation**
- Add your **Start Date**
- Add your **End Date**
- Click on the green **Add Academic Holiday** button

Repeat this process for the **Easter Holidays** and **Summer Holidays**

You can add any INSET days in the same way

- When you have finished adding all of your dates, the screen will look like this and you should no longer have any dates in red

Academic Calendar

Academic Year 2025/2026

Academic year name	2025/2026 ▶
Dates	01 Sep 2025 - 31 Aug 2026 ▶

Days Unaccounted For

All days have been accounted for.

Mark Calendar as Complete

Terms (2025/2026) ⊕ Add

Autumn Term	01 Sep 2025 - 19 Dec 2025 ▶
Spring Term	05 Jan 2026 - 27 Mar 2026 ▶
Summer Term	13 Apr 2026 - 20 Jul 2026 ▶

Holidays (2025/2026) ⊕ Add

INSET 1 & 2	01 Sep 2025 - 02 Sep 2025	Inset ▶
Autumn Half Term	27 Oct 2025 - 31 Oct 2025	Half-Term ▶
INSET 3	03 Nov 2025	Inset ▶
Christmas Holidays	22 Dec 2025 - 02 Jan 2026	Vacation ▶
Spring Half Term	16 Feb 2026 - 20 Feb 2026	Half-Term ▶
Easter Holidays	30 Mar 2026 - 10 Apr 2026	Vacation ▶
Summer Half Term	25 May 2026 - 29 May 2026	Half-Term ▶
INSET 4 & 5	17 Jul 2026 - 20 Jul 2026	Inset ▶
Summer Holidays	21 Jul 2026 - 31 Aug 2026	Vacation ▶

- If you are happy with the calendar, click on the green **Mark Calendar as Complete** button

A review screen will appear (as shown here)

- Click on the green **Mark as Complete** button

NOTE: If you do not do this step, you will not be able to proceed with the rest of the New Year Setup

Complete Academic Calendar

Please review the Academic Calendar dates below, and click "Mark as complete" when you are sure these are correct.

Academic Year Review

Autumn Term	01 Sep 2025 - 19 Dec 2025	
INSET 1 & 2	01 Sep 2025 - 02 Sep 2025	Inset
Autumn Half Term	27 Oct 2025 - 31 Oct 2025	Half-Term
INSET 3	03 Nov 2025 - 03 Nov 2025	Inset
Christmas Holidays	22 Dec 2025 - 02 Jan 2026	Vacation
Spring Term	05 Jan 2026 - 27 Mar 2026	
Spring Half Term	16 Feb 2026 - 20 Feb 2026	Half-Term
Easter Holidays	30 Mar 2026 - 10 Apr 2026	Vacation
Summer Term	13 Apr 2026 - 20 Jul 2026	
Summer Half Term	25 May 2026 - 29 May 2026	Half-Term
INSET 4 & 5	17 Jul 2026 - 20 Jul 2026	Inset
Summer Holidays	21 Jul 2026 - 31 Aug 2026	Vacation

Cancel   **Mark as Complete**

Step 1 is now complete

School Year Setup

2025/2026

1. Academic Calendar	Complete
2. Off-Roll Leavers	Available
3. Year Groups and Registration Forms	Available
4. Custom Groups	Available
5. Houses	Locked
6. Registers	Locked
7. Meals	Locked
8. Interventions	Available
Review School Year Setup	

Off Roll Leavers

School > School Structure > School Year Setup > Off-Roll Leavers

Off-Roll Leavers setup steps are optional. You can Skip this step to review later.

- Click on the **Off-Roll Leavers** Section

- Select **Year 6** from the slide out

- A list of Year 6 pupils will be listed, ensure they are all ticked
- Add in the **Leaving Date**
- Add in the **Leaving Reason**
- Click on the green **Process Leavers** button

NOTE: If the Leaving Reason is different for some students, for example, they go to an Independent school or their destination is Unknown, you will have to change these individually.

To change the Leaving Reason:

- Click onto the students **Leaving Reason**
- Click on the orange **Edit** button
- Change the **Leaving Reason**, e.g. In year transfer – Independent School
- Click on the green **Save Changes** button

The destination school can now be added to the students, to do that:

- **Tick the students** that are all going to the same destination school
- Click on the green **Bulk Action** button
- Click on **Set Destination School**

- Select a **Destination School** from the drop down list
- Add in an **Expected Entry Date**
- Click on the green **Set Destination School** button
- Repeat this until all Leavers have a destination school

NOTE: See page 13 for instructions on how to Add a new Destination School

Generating CTF's for Leavers

School > School Structure > School Year Setup > Off-Roll Leavers

Once all the leavers have had a Destination assigned, you can generate the CTF Files for the Schools.

- At the bottom of the Leavers students list, you will find the Leavers Area, where the school CTF files can be created from

- **Click on the first School** you want to generate the CTF file for
- Select the **Destination**
- Click on the green **Next** button

New CTF Export (step 1 of 2)

CTF Details

CTF Type   Full CTF file

Destination*   School in England Or Wales

- School in England Or Wales ✓
- Private or independent school
- Unknown destination in England or Wales
- Unknown destination outside England or Wales
- Local Authority

- Select the **Destination LA** from the list
- Select the **School** from the list
- Ensure the correct pupil have been selected, remove any ticks if necessary
- Click on the green **Create CT**F button
- A warning message is displayed (as shown below)
- Click the green **Yes** button to confirm

« Back   New CTF Export (step 2 of 2)

CTF Details

CTF Type   Full CTF file

Destination LA ❷   Haringey (309)

School* ❷   Alexandra Park School (4036)

Notes (output in CTF) ❷

Address format ❷   Address Line

Confirm Included Students

The students who will be included in the CTF. You can untick any you would like not to be included. Students that are not enrolled at the time of export (or not enrolled at the end or start date of the chosen academic year for past and future academic year exports respectively) are unticked by default.

Students
☑ Campbell Grant
☑ Cooper Abbie
☑ Cooper Vanessa
☑ Cox Faye
☑ Green Caitlin
☑ Hunt Kieran
☑ Jones Arthur
☑ Matthews Jacob
☑ Morris Stacey
☑ Murphy Dennis
☑ Robertson Freddie
☑ Robertson Jonathan
☑ Rose Keith
☑ Taylor Alice
☑ Wilkinson Vanessa

Cancel   Create CTF

Note!

Please be aware that it may take a minute or so to create the CTF, so please be patient. The slideover will close as soon as you click OK. When the CTF is finished you will be alerted by a notification in the top right corner of the screen, so keep an eye on those. Or you can simply check the student's profile page in a minute's time, by which time the CTF should be done.

Cancel   Yes

- When the file is ready, you will receive a Notification
- Click on the **Notification Bell**
- Click on the **Message** informing you the CTF File is ready

Notifications

Notifications

CTF Generated: Alexandra Park School, Haringey 1 minute ago
15 students

- When the slide out appears, click on the green **Download** button and the CTF file will be saved to your computer
- Click on the **Back** button to close the slide out
- Repeat this for all other CTF Files
- When you are ready, click on the green **Mark as Complete** button

Step 2 is now complete

Adding a New Educational Institution

School > Linked Organisations > Educational Institutions

Educational Institutions

Create New Educational Institution

Search Educational Institutions | Search

Bulk action ▾ | Hide columns ▾ | Search this table

☐	Educational Institution	Address	Linked Students
☐	Alexandra Primary School		3
☐	Arbor ELouzao Primary School	320 Canalot Studios, 222 Kensal Road, L...	9
☐	Cherry Tree Primary		2
☐	Downhills Primary School		0
☐	Dukes Aldridge Academy	Trulock Road, Tottenham, London, N17 0PG	3
☐	Mulberry Academy Woodside	White Hart Lane, Wood Green, London, N...	61
☐	Mulberry Primary School	Parkhurst Road, London, N17 9RB	1
☐	Not Specified		3
☐	Pinewood Secondary	London	156

- Click on the green **Create New Education Institution** button (top right corner)
- **Type in the name** of the new educational institution
- **Type in the short name** of the new educational institution
- Click on the green **Add new educational institution** button

New Educational Institution

Educational institution name*	Norfolk House School
Educational institution short name	Norfolk House School

Cancel | Add new educational institution

- To edit the new Educational Institution, **Click on the New Education Institution**
- Click into each section and fill in the following fields:
  - ♦ Local Authority
  - ♦ Establishment Number
  - ♦ URN
  - ♦ UKPRN
  - ♦ School Phase
  - ♦ Governance type
  - ♦ Address
  - ♦ Telephone Number

NOTE: All of this information can be found on the Get Information about School Website

https://get-information-schools.service.gov.uk/

« Back — **Norfolk House School**

Norfolk House School

Educational Institution Details

Name	Norfolk House School	▸
Short name	Norfolk House School	▸
Opening dates	Ongoing	▸
Website	http://www.norfolkhouseschool.org	▸
Centre number		▸
Local authority	Haringey (309)	▸
Establishment number	6053	▸
URN	102165	▸
Provider reference number (UKPRN)	10078271	▸
School phase	Primary	▸
Governance type	Independent	▸
Intake type		▸
Intake sex	Coeducational	▸
Weekly Hours Open		▸

Contact Details ⊕ Add

Home number	020 8883 4584	
Home address	10 Muswell Avenue Muswell Hill London N10 2EG	17 Jun 2025 - ongoing ▸

STEP 3

Year Groups and Registration Forms

This next step is where we setup the Year Groups and Registration Forms for the next year. This step is required but you can return to it once completed to make further changes.

Year Groups and Registration Forms

Setup 2025/2026	
3a. Copy year groups and registration forms	Incomplete ▸
3b. Assign tutors to year groups and registration forms	Copy or add year groups and registration forms to assign tutors
3c. Promote Year Group Students	No Year Groups exist for 2025/2026.
3d. Enrol Applicants	Incomplete ▸
3e. Review and tweak Year Group enrolments	Optional ▸
3f. Promote Registration Form Students	No Registration Forms exist for 2025/2026.
3g. Review and tweak registration form enrolments	Optional ▸

Review

Year Groups (2025/2026)   ⊕ Add

No Year Groups exist for 2025/2026

Registration Forms (2025/2026)   ⊕ Add

No Registration Forms exist for 2025/2026

3a. Copy Year Groups & Registration Forms

First, we must choose which year groups and registration forms to copy over to next year. Don't worry if your registration forms will have different names next year. Just copy the number of forms you will need, then change the name later.

Copy Year Groups and Registration Forms

Tick the year groups and registration forms you would like to copy to the next academic year. If you untick a year group but leave a registration form for the year group ticked, the registration form will still be copied, but it will not be linked to a year group. Student enrolments will not be carried forward in this step.

Nursery

Year group ❷ ☑ Nursery

Reception

Year group ❷ ☑ Reception

Registration forms ❷ ☑ Form REKC
☑ Form RESC
☑ Nur AM
☑ Nur FT
☑ Nur PM

Year 1

Year group ❷ ☑ Year 1

Registration forms ❷ ☑ Form 1CA
☑ Form 1LM

Year 2

Year group ❷ ☑ Year 2

Registration forms ❷ ☑ Form 2AR
☑ Form 2JP

Year 3

Year group ❷ ☑ Year 3

Cancel   Copy Year Groups

- Click on the option **3a. Copy year groups and registration forms**
- Tick the Year groups and Registration Forms you want to copy
- Click on the green **Copy Year Groups** button

- You will then see the copied Year Groups and Registration Forms in the Review area

> **NOTE:** Each Registration Form will have an Academic Year and Year Group setting. Click on each registration form to ensure these are set correctly

Resolving students without an enrolment

If you have students who were not assigned a year group this academic year, they will not have been promoted to the next year group during step 2. Instead, they will appear in the **Review** section (as shown here)

If they are attending your school next year, you will need to add them to a year group and registration form.

- Click the **Student's Name** to visit their profile

- First, change the **Academic Year** to next year.

- In the Enrolments section, click the green **Add** button
- Select the **Enrolment mode**
- Select the **Attendance pattern**
- Select the **Year Group** for next year
- Select the **Registration form** for next year
- Click on the green **Enrol Student** button

Return to **School > School Structure > New School Year > 3. Year Groups and registration Forms**

That Student will now not appear in the Review section. Repeat this process for all remaining students that appear.

3b. Assign tutors to year groups and registration forms

- Click on the option **3b. Assign tutors to year groups and registration forms**

- **Assign a Tutor** to each Year and Registration forms Tutor by choosing from the drop down lists

- Click on the green **Assign Tutors** button when finished

3c. Promote Year Groups Students

- Click on the option **3c. Promote Year Group Students**
- **Choose which year groups to promote** students into.
- Click on the green **Promote** button

> **NOTE:**
>
> If only some students are moving up (such as for nursery), promote the whole year. You can then move the students who are remaining in nursery back in the 'tweak' step later.
>
> If you'll be splitting classes, promote the whole year. You can then move the students who will be in a different class in the 'tweak' step later.

Promote Year Group Students

Here you can promote the students from the 2024/2025 year groups to 2025/2026 year groups. We have made some suggestions, but you can change these as you want below. Don't worry if you at this point are not sure which new year groups students should go in - you will get a chance to review and move students around at a later step.

Nursery (2024/2025)	Reception (2025/2026)
Reception (2024/2025)	Year 1 (2025/2026)
Year 1 (2024/2025)	Year 2 (2025/2026)
Year 2 (2024/2025)	Year 3 (2025/2026)
Year 3 (2024/2025)	Year 4 (2025/2026)
Year 4 (2024/2025)	Year 5 (2025/2026)
Year 5 (2024/2025)	Year 6 (2025/2026)
Year 6 (2024/2025)	Promote to...

Cancel   Promote

3d. Enrol Applicants

In this step, you'll be able to enrol your Applicants into Registration Forms and year groups, as you've now set them up.

If you haven't yet added your applicants to Arbor and finished processing them, you won't be able to enrol them yet. When you click the **4. Enrol Applicants** option, you'll see this message.

Enrol Applicants

You have 1 unprocessed application for which the applicants cannot yet be enrolled. To manage your applications please click 'Manage Applications' below. Note! Enrol applicants setup as part of School Year Setup will remain with a red 'Incomplete' status, until all unprocessed applications have been dealt with.'

Cancel   Manage Applications »

See the Admissions - Offers Day Guide on how to add Applicants into Arbor

Once all Applicants has accepted their offers, you can proceed with this step

- Click on the option **3d. Enrol Applicants**
- **Tick the Applicants** you want to enrol
- Click on the green **Enrol Applicants** button

Enrol Applicants

Here you can enrol any applicants that have had their application accepted, and not withdrawn it, but who are yet to be enrolled. Each applicant will be enrolled in the academic level and registration form that have been set in the Applications section (shown in parenthesis). If no academic level or registration form has been set they will simply be enrolled in the academic year and you will be able to set the year group and academic level later in the process.

Applicants
- ☑ Simon Bailey (year group TBC, registration form TBC)
- ☑ Sarah Smith (year group TBC, registration form TBC)
- ☑ Ethan Paine (year group TBC, registration form TBC)
- ☑ Martha Collins (year group TBC, registration form TBC)
- ☑ Christian Miller (year group TBC, registration form TBC)

Cancel   Enrol Applicants

3e. Review and tweak Year Groups enrolments

The next step is to make any changes (if necessary) to the year group a student has been automatically promoted to. This is an optional step.

- Click on the option **3e. Review and tweak Year Group enrolments**

- Click in the Year Group column against a student
- Select the Year Group the student will be in next year (as shown here)

- Or select multiple rows and use the **Bulk action** button to change the student's year group
- Click the **Back** button to return to the New School Year Setup.

3f. Promote Registration Form Students

- Click on the option **3f. Promote Registration Form Students**

- **Choose which year groups to promote** students into.

- Click on the green **Promote** button

- Once promoted, the registration forms will look like this

Promote Registration Form Students

Here you can enrol students from 2024/2025 registration forms into 2025/2026 registration forms. Don't worry if you at this point are not sure which students belong in which new registration forms - you will get a chance to review and move students around at a later step.

Nursery (2024/2025) to Reception (2025/2026)

Nur AM (2024/2025)	Already promoted to Form REKC (2025/2026)
Nur FT (2024/2025)	Already promoted to Form REKC (2025/2026)
Nur PM (2024/2025)	Already promoted to Form REKC (2025/2026)

Reception (2024/2025) to Year 1 (2025/2026)

| Form REKC (2024/2025) | Already promoted to Form 1CA (2025/2026) |
| Form RESC (2024/2025) | Already promoted to Form 1LM (2025/2026) |

Year 1 (2024/2025) to Year 2 (2025/2026)

| Form 1CA (2024/2025) | Already promoted to Form 2AR (2025/2026) |
| Form 1LM (2024/2025) | Already promoted to Form 2JP (2025/2026) |

Year 2 (2024/2025) to Year 3 (2025/2026)

| Form 2AR (2024/2025) | Already promoted to Form 3AM (2025/2026) |
| Form 2JP (2024/2025) | Already promoted to Form 3ER (2025/2026) |

Year 3 (2024/2025) to Year 4 (2025/2026)

| Form 3AM (2024/2025) | Already promoted to Form 4CA (2025/2026) |

Cancel   Promote

Promote Registration Form Students

Here you can enrol students from 2024/2025 registration forms into 2025/2026 registration forms. Don't worry if you at this point are not sure which students belong in which new registration forms - you will get a chance to review and move students around at a later step.

Reception (2024/2025) to Year 1 (2025/2026)

Form REKC (2024/2025)	Form 1CA (2025/2026)
Form RESC (2024/2025)	Form 1LM (2025/2026)
Nur AM (2024/2025)	
Nur FT (2024/2025)	
Nur PM (2024/2025)	

Year 1 (2024/2025) to Year 2 (2025/2026)

| Form 1CA (2024/2025) | Form 2AR (2025/2026) |
| Form 1LM (2024/2025) | Form 2JP (2025/2026) |

Year 2 (2024/2025) to Year 3 (2025/2026)

| Form 2AR (2024/2025) | Form 3AM (2025/2026) |
| Form 2JP (2024/2025) | Form 3ER (2025/2026) |

Year 3 (2024/2025) to Year 4 (2025/2026)

| Form 3AM (2024/2025) | Form 4CA (2025/2026) |

Cancel   Promote

3g. Review and tweak registration Form enrolments

- Click on the option **3g. Review and tweak registration form enrolments**

- Select the **Year Group** you wish to make changes to

- **Click on the cell** containing the registration from information and a drop-down will appear offering the choices of classes for their year group

- **Select the class** you wish to move them to

> **NOTE:** You are able to select multiple rows by clicking and dragging and then you are able to use the **Bulk action** button to change the student's registration form.

- **Select the cells** to fill in

- Click on the green **Bulk action** button
- Select the **Bulk Fill** option
- Select the **New Value** with the registration form you wish to apply to those students
- Click on the green **Submit** button

Repeat this process for all Year groups until you have made all the students changes to their registration form

- Click on the **<<Back** button to return to the Year Groups and Registration Forms screen
- When ready, click on the green **Mark as complete** button

Step 3 is now complete

STEP 4

Custom Groups

In this area you can copy or creating Custom Groups for the upcoming academic year as part of the New School Year Setup process.

You are able to copy existing groups, add new ones, and edit or delete groups as needed.

This step is Optional, so if you either do not want to copy any existing custom groups or create any new custom groups, you should click on the green **Mark as Complete** button.

School Year Setup		
2025/2026		
1. Academic Calendar		Complete
2. Off-Roll Leavers		Complete
3. Year Groups and Registration Forms		Complete
4. Custom Groups		Available
5. Houses		Available
6. Registers		Locked
7. Meals		Available
8. Interventions		Available
Review School Year Setup		

4. Custom Groups

Custom Groups setup is available and needs to be marked as complete

NOTE: If this step is '**Locked**', you will need to go back to the Academic Calendar step and click **Mark as Complete**

If you don't currently use custom groups but want to next year, you won't be able to copy them over. You will have to add then in next year in **School > School Structure > Custom Groups**

Copy any existing custom groups

- Click on the **Custom Groups** option

- Click on the **Copy custom groups from 2024/2025** option

A list of all custom groups in your current year will be listed in the slide out

- Here you can select

  - which groups you would not like to copy over
  - which groups you would like to copy over with no student enrolments
  - which groups you would like to copy over completely, including the students who are enrolled in the group.

- When you have made all your choices, click on the green **Copy Custom Groups** button

NOTE: When selecting **Copy Group and Members**:

- Custom groups where students, staff or guardians have been added manually will have the people in the custom group copied over.

- Where they've been added using **Automatic Membership Criteria**, the people will be copied over, but the automatic membership criteria will NOT be. This means that to keep the custom group updated, you'll need to add the Automatic Membership Criteria again. This is because Automatic Membership Criteria are based on information for a specific academic year.

Add a New custom group

- Click on the green **Add** button in the **Review** section

- Add in the **Group name**
- Add in the **Description**
- Choose if it will contain **Students**
- Choose if it will contain **Guardians**
- Choose if it will contain **Staff**
- Click on the green **Create custom group** button

- When you are happy that this section is now complete, click on the green **Mark as complete** button

Step 4 is now complete

STEP 5

Houses

The next step is to copy your Houses over to the next academic year. **This step is Optional.**

> **NOTE:** If this step is '**Locked'**, you will need to go back to the Academic Calendar step and click **Mark as Complete**
>
> If you don't currently use houses or do not want to copy this year's houses over, then click on the green Mark as complete button and move onto the next step.

School > School Structure > School Year Setup > Houses

- Click on the **Houses** option
- Click on the **Copy houses and house enrolments** option
- **Tick which Houses** you want to copy over to the new academic year
- Click on the green **Copy** button

- When you are happy that this section is now complete, click on the green **Mark as complete** button

Step 5 is now complete

STEP 6

Registers

If you have nursery children at your school, you will need to schedule the registers for them first. Because your students may not be attending full time, you will need to schedule registration forms and enrol your nursery students into them differently, depending on whether they attend during the same times every day or not.

Scheduling your Nursery registers

There are two ways of making sure students appear in the right registers only - using enrolments or using Attendance Patterns. Here are some details about each below:

Option 1 - Manage registers through enrolments
New students must be enrolled in their lessons.

On our **Students > Enrolment > Courses > Bulk Enrolment** page, you can enrol students into the right registers, add an end date if their enrolment will be changing and see what registers students are enrolled in at any point in the year.

Option 2 - Use Attendance Patterns if students attend the same times every day of the week

Using the Attendance Pattern method, you can include students in all morning roll call registers, all afternoon roll call registers, or both morning and afternoon roll-call registers.

For most schools, we recommend option 1 instead, as you cannot use Attendance Patterns for students who do not attend during the same times every day of the week. For example, a student attends all day Monday-Wednesday but doesn't attend Thursday or Friday, or a student attends afternoon only on Monday and mornings the rest of the week.

Can we use a combination of the two options?

We don't recommend using a combination of options 1 and 2, as this process can be hard to manage.

- Click on the option **A Schedule Sessions from Registration Forms**

- **Tick the boxes** to the left of the **Nursery registration forms** (as shown above)
- Click on the green **Bulk action** button
- Select the **Schedule Registration Forms** option

- Enter in the **Morning start time**

- Enter in the **Morning end time**

- Enter in the **Afternoon start time**

- Enter in the **Afternoon end time**

- In the **Use attendance pattern** box, select the option **Use bulk enrolment screen to manage nursery enrolment**

- Click on the green **Schedule Registration Forms** button

- Confirm again by clicking on the green **Schedule** button

- The status then changes to **Already Timetabled**

Within the Review Registers area, you will then see registers for each nursery registration form (as shown here)

For your NAM Registers, you will need to remove the afternoon registers as these will not exist

- Click on the first register to remove
- Click on the red **Delete Course** button
- Confirm again by clicking on the red **Delete Course** button
- Repeat this for all other PM sessions for the NAM Course
- Once finished, you should have a setup like this (see below)

Delete Nursery: Nur AM: Monday PM (2025/2026)?

« Back

Deleting this course will also permanently remove all related information, such as lessons and attendance. This action can't be undone. Do you wish to continue?

Cancel   Delete Course

Review Registers (2025/2026)   ⊕ Add

- Nursery ▶
  - Nur AM ▶
    - Monday AM ▶
    - Tuesday AM ▶
    - Wednesday AM ▶
    - Thursday AM ▶
    - Friday AM ▶

For your NPM registers, you will need to remove the morning registers as these will not exist

Repeat the above process to remove them and you should be left with a setup like this (as shown below)

Review Registers (2025/2026)   ⊕ Add

- Nursery ▶
  - Nur AM ▶
    - Monday AM ▶
    - Tuesday AM ▶
    - Wednesday AM ▶
    - Thursday AM ▶
    - Friday AM ▶
  - Nur FT ▶
    - Monday AM ▶
    - Monday PM ▶
    - Tuesday AM ▶
    - Tuesday PM ▶
    - Wednesday AM ▶
    - Wednesday PM ▶
    - Thursday AM ▶
    - Thursday PM ▶
    - Friday AM ▶
    - Friday PM ▶
  - Nur PM ▶
    - Monday PM ▶
    - Tuesday PM ▶
    - Wednesday PM ▶
    - Thursday PM ▶
    - Friday PM ▶

> **NOTE:** If you have Nursery pupils who have not yet been enrolled into a registration form, then you will see an orange Nursery bilk enrolment button above the review Registers section

It looks like some nursery students are not enrolled into a course yet. You can do this via the nursery bulk enrolment screen.

Nursery bulk enrolment

- Click on the orange **Nursery bulk enrolment** button

> **NOTE:** If you were to use the menus to get to this area, the path for this is **Students > Enrolment > Academic > Courses > Bulk Enrolment**

- **Tick the box next to the students** who will go into the same nursery registration form

- Click on the green **Bulk action** button

- Select the option **Bulk enrol students**

Course Enrolments

	Student	Year Group		M...	M...	Tu...	Tu...	W...	W...
☑	**Bailey** Simon	Nursery (2025/2026)							
☐	**Collins** Martha	Nursery (2025/2026)							
☐	**Miller** Christine	Nursery (2025/2026)							
☐	**Parson** Shelly	Nursery (2025/2026)							
☑	**Payne** Ethan	Nursery (2025/2026)							
				Row Cou 0	Row Cou 0	Row Cou 0	Row Cou 0	Row Cou 0	Row Cc 0

- Select the **Start date**

- Select the **End date**

- In the **Enrol in courses** box, select each weekly session the students will be attending

  > **EXMAPLE:** This image show the students enrolling in the NAM registration form for the whole week

- Click on the green **Enrol Students** button

Repeat this process if you have NPM and NFT registration forms

Return to the School Year Setup area
School > School Structure > School Year Setup > Registers

« Back   **Enrol Students**

Please note that it may take a moment for the enrolments to complete, so please be patient.
Student(s) will be automatically enrolled into the parent courses.

Students	Simon Bailey and Ethan Payne
Start date*	1st Sep 2025
End date	31st Aug 2026
Notify timetabled staff members	☐
Enrol in courses*	Nursery: Nur AM: Monday AM (2025/2026) ⊗
	Nursery: Nur AM: Tuesday AM (2025/2026) ⊗
	Nursery: Nur AM: Wednesday AM (2025/2026) ⊗
	Nursery: Nur AM: Thursday AM (2025/2026) ⊗
	Nursery: Nur AM: Friday AM (2025/2026) ⊗

Cancel   **Enrol Students**

> **NOTE:** The orange **Nursery bulk enrolment** will now have disappeared if you have assigned all nursery students to courses

Scheduling your Reception registers

School > School Structure > School Year Setup > Registers

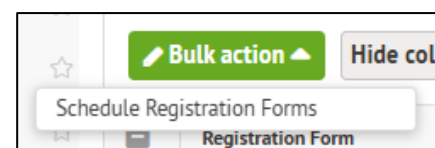- Click on the option **A Schedule Sessions from Registration Forms**

- **Tick the boxes** to the left of the **Reception registration forms** (as shown above)
- Click on the green **Bulk action** button
- Select the **Schedule Registration Forms** option

- Enter in the **Morning start time**

- Enter in the **Morning end time**

- Enter in the **Afternoon start time**

- Enter in the **Afternoon end time**

- In the **Create separate modules per day for reception classes?** box, select the option **No, we will not be using attendance patterns**

- Click on the green **Schedule Registration Forms** button

- Confirm again by clicking on the green **Schedule** button

- The status then changes to **Already Timetabled**

Scheduling your Year 1 to Year 6 registers

- Click on the option **A Schedule Sessions from Registration Forms**

- **Tick the boxes** to the left of the **Y1 to Y6 registration forms** (as shown above)
- Click on the green **Bulk action** button
- Select the **Schedule Registration Forms** option

- Enter in the **Morning start time**

- Enter in the **Morning end time**

- Enter in the **Afternoon start time**

- Enter in the **Afternoon end time**

- Click on the green **Schedule Registration Forms** button

- Confirm again by clicking on the green **Schedule** button

- The status then changes to **Already Timetabled**

- Click on the Registers option on the left side menu and you will be returned to the Registers overview (as shown below)

Review Registers (2025/2026)　　　　　　　　　　　　　　　　　　　　　✪ Add

— Nursery	▶
✚ Nur AM	▶
✚ Nur FT	▶
✚ Nur PM	▶
— Reception	▶
Form REKC	▶
Form RESC	▶
— Year 1	▶
Form 1CA	▶
Form 1LM	▶
— Year 2	▶
Form 2AR	▶
Form 2JP	▶
— Year 3	▶
Form 3AM	▶
Form 3ER	▶
— Year 4	▶
Form 4CA	▶
Form 4SM	▶
— Year 5	▶
Form 5JT	▶
Form 5ZCMA	▶
— Year 6	▶
Form 6LJ	▶
Form 6SC	▶

Changing Registration Form Names

School > School Structure > School Year Setup > Registers

- Click on the option **A Schedule Sessions from Registration Forms**
- Scroll down until you see the **Review Registers** area (as shown on previous page)

- Click into a **Registration form**
- Click in the **Course name**
- **Change the Course name** if required
- Click on the green **Save Changes** button

Reception: Form REKC

Academic Lead	Helen Lloyd
Parent Course	Reception
Enrolment	0 Students

Admin

Course name	Form REKC
Abbreviation	Not set
Academic year	2025/2026
Component of	Reception
Year group	Reception (2025/2026)
Subject	Not set
Linked Departments	Not set
Learning Aims	Not set
Students	6
Take attendance?	Lesson Attendance (UK DfE)

« Back **Course Name**

Course name*	Form REVA
Abbreviation	

Cancel **Save Changes**

> **NOTE:** While you are in this area, also check that a Year Group has been assigned. If not then click on the Year Group and select the appropriate Year, then Save Changes

- Click on the **back arrow** to return to the Registers overview area

- Repeat for all other registration forms you wish to change the name for

> **NOTE:** You can check that your registers are ready for the next academic by going to **Students > Attendance > Registers > Registers By Date**. Click on the calendar and select the first day of term, click on the green **Change Date** button. The registers will be displayed here

- When you are happy that this section is now complete, click on the green **Mark as complete** button

Step 6 is now complete

Registers By Date

Wed, 03 Sep 2025

Hide columns ▼

Period	Lesson/Event	Staff
08:45 - 12:00	Reception: Form RESC (2...	Carl Isle
08:45 - 12:00	Reception: Form REVA (...	Helen Lloyd
08:45 - 12:00	Year 1: Form 1CA (2025/...	Chris Allen
08:45 - 12:00	Year 1: Form 1LM (2025-...	Leo Murphy
08:45 - 12:00	Year 2: Form 2AR (2025/...	Alice Russell
08:45 - 12:00	Year 2: Form 2JP (2025/...	Jason Patel
08:45 - 12:00	Year 3: Form 3AM (2025-...	Amy Mitchell
08:45 - 12:00	Year 3: Form 3ER (2025/...	Elsie Robertson
08:45 - 12:00	Year 4: Form 4CA (2025/...	Chris Allen
08:45 - 12:00	Year 4: Form 4SM (2025-...	Sahil Mahadeo
08:45 - 12:00	Year 5: Form 5JT (2025/...	Jason Thompson

STEP 7

Meals

The next step is to copy over your Meals Setup for the next academic year. **This step is optional.**

1. Copy Meals and Meal Provisions

- Click on the **1. Copy Meals and Meal Provisions** option

Copy Meals and Provisions

Below is a list of the Meals and Meal Provisions for 2024/2025. Tick the ones you would like to copy to 2025/2026, and untick the ones that should not be copied. For any provision that is ticked, the meal it belongs to will automatically be copied over.

Lunch

Meal provisions
- ☑ Absent
- ☑ Cold Lunch
- ☑ Hot Lunch Meat/Fish
- ☑ Hot Lunch Vegan/Veggie
- ☑ Packed Lunch

- Tick which **Meal Setup and Provisions** that you require
- Click on the green **Copy** button

School Dinner

Meal provisions
- ☐ Absent
- ☐ Hot Meal 1
- ☐ Hot Meal 2
- ☐ Hot Meal 3
- ☐ Jacket Potato
- ☐ Packed Lunch
- ☐ Staff Meal (Free)
- ☐ Staff Meal (Paid)

Cancel   Copy

2. Copy Meal Sittings and Attendees

NOTE: Depending on your setup, you may have to go through option **2. Copy Meals Sittings and Attendees**. In my example it has already copied these as I only have 1 sitting.

- Click on step **2. Copy Meals Sittings and Attendees**

- Tick the meal sittings and attendees you would like to copy and untick the ones that should not be copied.

- Click on the green **Copy Meal Sittings** button

Lunch Sitting

Sitting 1

Copy sitting timetable ❓ ☑ Mon: 12:00 - 12:45, Tue: 12:00 - 12:45, Wed: 12:00 - 12:45, Thu: 12:00 - 12:45 and Fri: 12:00 - 12:45

Copy sitting attendees ❓ ☑ Form 1MJ (2021/2022)
☑ Form 1TP (2021/2022)
☑ Form 2QH (2021/2022)
☑ Form 2VG (2021/2022)

Cancel   Copy Meal Sittings

NOTE: If you do not copy the sitting timetable or at least one sitting attendee group, the sitting itself will not be copied. It is recommend copying over your attendees to make sure teachers can access the Meal Register for their classes.

3. Copy Meal Prices

> **NOTE:** Depending on your setup, you may have to go through option **3. Copy Meal Prices**. In my example, this setup has already been copied and completed.

- Click on step **3. Copy Meals Prices**

- Tick the meal prices you would like to copy and untick the ones you would like to discard.

- Click on the green **Copy Meal Prices** button

- You may have to review some prices. If so, these will be shown in the Review area (as shown below)

Prices for Provision: Absent

Absent (£0.00) ☑ All Students

Prices for Provision: Packed Lunch

Packed Lunch (£0.00) ☑ All Students

Prices for Provision: School Packed Lunch

FSM (£0.00) ☑ Free School Meal

Paid (£2.20) ☑ All Other Students

Cancel **Copy Meal Prices**

Review 2025/2026 Meal Setup

Below you can review the data for each meal set up for 2025/2026 .

Lunch (2025/2026)

Meal Provisions and Prices		⊕ Add
Absent (2025/2026)	No price required	
Absent (2025/2026)	No price required	
Cold Lunch (2025/2026)	Price required but no meal price set , click to resolve	▶
Hot Lunch Meat/Fish (2025/2026)	Price required but no meal price set , click to resolve	▶
Hot Lunch Vegan/Veggie (2025/2026)	Price required but no meal price set , click to resolve	▶
Packed Lunch (2025/2026)	No price required	
Packed Lunch (2025/2026)	No price required	
School Lunch (2025/2026)	Free School Lunch (£0.00) • Free School Meal Students School Lunch (£2.00) All Other Students	
School Packed Lunch (2025/2026)	Price required but no meal price set , click to resolve	▶
Staff Duty Meal (2025/2026)	Staff Duty Meal (£0.00) All Staff	
Staff Meal (2025/2026)	Staff Meal (£3.50) All Staff	

- Click on the **Meal Provision** you wish to edit
- Select a **Price category name**
- Type in the **Price**
- Select the **VAT rate**
- Select if it applies to **Students or Staff**
- Select the **specific groups**
- Set your **dates**
- Click on the green **Set Price** (if this is the only one or on the green **Set Price & Add Another** button

Set Price for Cold Lunch (2025/2026)

Please enter the new meal price inclusive of VAT.

Price category name* ❷	Cold Lunch
Price (incl. VAT)*	£ 2.00
VAT rate*	Exempt (0%)
Applies To*	◉ Students ○ Staff
Specific Groups* ❷	All Students ⊗
From	1st Sep 2025
Until	31st Aug 2026

Cancel **Set Price** **Set Price & Add Another**

Set Price for Cold Lunch (2025/2026)

Please enter the new meal price inclusive of VAT.

Price category name*	FSM Cold Lunch
Price (incl. VAT)*	£ 0
VAT rate*	Exempt (0%)
Applies To*	● Students ○ Staff
Specific Groups*	Free School Meal Students
From	1st Sep 2025
Until	31st Aug 2026

Cancel   **Set Price**   **Set Price & Add Another**

EXAMPLE: Here is an example of the same Cold Lunch but for FSM students

Repeat this process until all Prices have been resolved. When finished, your setup may look something like this

Meal Provisions and Prices   ⊕ Add

Absent (2025/2026)	No price required
Absent (2025/2026)	No price required
Cold Lunch (2025/2026)	FSM Cold Lunch (£0.00) • Free School Meal Students Cold Lunch (£2.00) All Other Students
Hot Lunch Meat/Fish (2025/2026)	FSM Hot Lunch Meat/Fish (£0.00) • Free School Meal Students Hot Lunch Meat/Fish (£2.00) All Other Students
Hot Lunch Vegan/Veggie (2025/2026)	FSM Hot Lunch Vegan/Veggie (£0.00) • Free School Meal Students Hot Lunch Vegan/Veggie (£2.00) All Other Students
Packed Lunch (2025/2026)	No price required
Packed Lunch (2025/2026)	No price required
School Lunch (2025/2026)	Free School Lunch (£0.00) • Free School Meal Students School Lunch (£2.00) All Other Students
School Packed Lunch (2025/2026)	FSM School Packed Lunch (£0.00) • Free School Meal Students School Packed Lunch (£2.00) All Other Students
Staff Duty Meal (2025/2026)	Staff Duty Meal (£0.00) All Staff
Staff Meal (2025/2026)	Staff Meal (£3.50) All Staff

4. Copy Meal Choices

> **NOTE: This step is optional** and will depend on whether you want meal registers to be pre-filled with student's regular meal choices.

If you do,

- Click on step **4. Copy Meals Choices**
- Click on the green **Copy Meal Choices** button

Copy Student Meal Choices

This page lets you copy the regular meal choices for all students from 2024/2025 to 2025/2026.
Even if you have already copied meal choices once, duplicates (i.e. meal choices with the exact same settings) will not be created.
Meal choices will only be copied for students enrolled in 2025/2026.
Please note: Meal choice with any of the following meal provisions will not be copied, simply because they have not been copied to 2025/2026:

- Hot Meal 1
- Hot Meal 2
- Hot Meal 3
- Packed Lunch

Cancel   Copy Meal Choices

Check you will have meal registers in September

You will need to make sure you've set up meals correctly to ensure you'll be able to select student's meal choices in the Meal Registers. If you have not yet set your attendees for meals, your meal register will be blank.

To fix this:

School > Meals > Setup

- Select the next **academic year** from the drop-down menu

Meal Setup: 2024/2025

	2024/2025
Lunch	2018/2019
Meal name: Lunch	2019/2020
Provisions	2020/2021
Prices	2021/2022
Meal Sittings Scheduled	2022/2023
Attendees	2023/2024
Meal Menus	2024/2025
Regular Meal Choices	2025/2026 ✖

- Click into **Attendees** option

Meal Setup: 2025/2026

	2025/2026
Lunch (2025/2026)	
Meal name: Lunch	✔
Provisions	✔
Prices	✔
Meal Sittings Scheduled	✔
Attendees	✖
Meal Menus	✖
Regular Meal Choices	✔

- Go to the **Automatic Group Attendees** tab

- Click on the green **Add** button to add students
- Select all the registration forms to add to the meal
- Click on the green **Add Automatic Attendees** button

This will then generate your meal registers

Return to **School > School Structure > School Year Setup > Meals**

- Click on the green **Mark as complete** button

Step 7 is now complete

Add Automatic Attendees

Automatic Attendees*
- Form REKC (2025/2026) ⊗
- Form RESC (2025/2026) ⊗
- Nur FT (2025/2026) ⊗
- Form 1CA (2025/2026) ⊗
- Form 1LM (2025/2026) ⊗
- Form 2AR (2025/2026) ⊗
- Form 2JP (2025/2026) ⊗
- Form 3AM (2025/2026) ⊗
- Form 3ER (2025/2026) ⊗
- Form 4CA (2025/2026) ⊗
- Form 4SM (2025/2026) ⊗
- Form 5JT (2025/2026) ⊗
- Form 5ZCMA (2025/2026) ⊗
- Form 6LJ (2025/2026) ⊗
- Form 6SC (2025/2026) ⊗

Cancel   Add Automatic Attendees

STEP 8

Interventions

The next step is to copy over your Interventions for the next academic year. **This step is optional.**

> **NOTE:** If you want to copy over or create interventions, follow the instructions below. If you don't, want to do this then click on the green **Mark as Complete** button

Copy Interventions

- Click on the **1. Copy Intervention** option

- **Tick the interventions** you would like to copy over to next year

- Click on the green **Copy Interventions** button

Edit Interventions

- **Click on an intervention** to edit within the Review area

- You'll need to then complete the intervention setup to create intervention groups, add students and schedule intervention sessions

- Return to **School > School Structure > School Year Setup > Interventions**

- When you are happy that this section is complete, click the green **Mark as Complete** button

Step 8 is now complete