



ACCREDITED
SUPPORT

End of Academic Year Using Bromcom

Data Protection Disclaimer

Screenshots used in this presentation and access to the management information system has been performed using a test system.

People depicted do not exist.

Screen shots are used for illustration purposes only.


A decorative graphic consisting of several overlapping, wavy blue lines that flow from the bottom right towards the center of the slide.

Before you start

- Gather a finalised list of your new tutor groups for next year. – ask SLT to provide them in alphabetical order.
- Confirm the term dates and inset days for your school.
- Decide to Import ATFs or not.
- You can run these processes at any time, BUT it's a good idea to ensure your information is no longer subject to change before you start.



Drop In Sessions

- Room availability is a challenge this year.
 - Corporate training room has been repurposed to other uses and bookings cancelled.
 - I am still search for a room – I will email schools if we have one.
 - If a school has a room, we could use please let me know.
- 

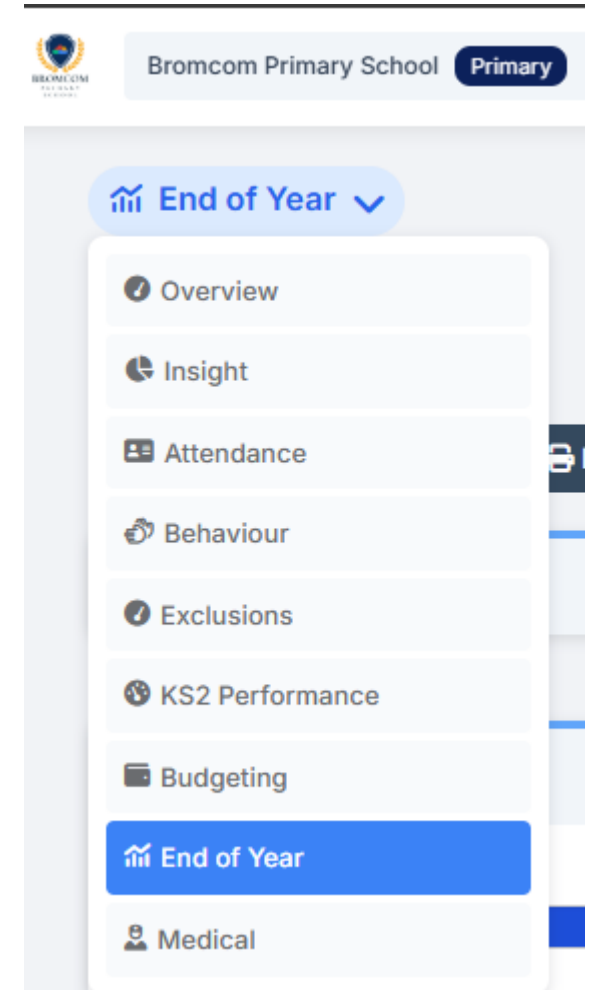
End Of Year

Do these processes before you finish for the summer









End of Year Dashboard

- From your Bromcom homepage, there is an end of year dashboard available to help you through the process.
- It acts as a helpful memory aid to ensure that you do all necessary processes.
- It doesn't know about advisory or optional tasks, so those won't show.
- You can mark items as complete as you do them.



End of Year Dashboard (2)

Key Tasks

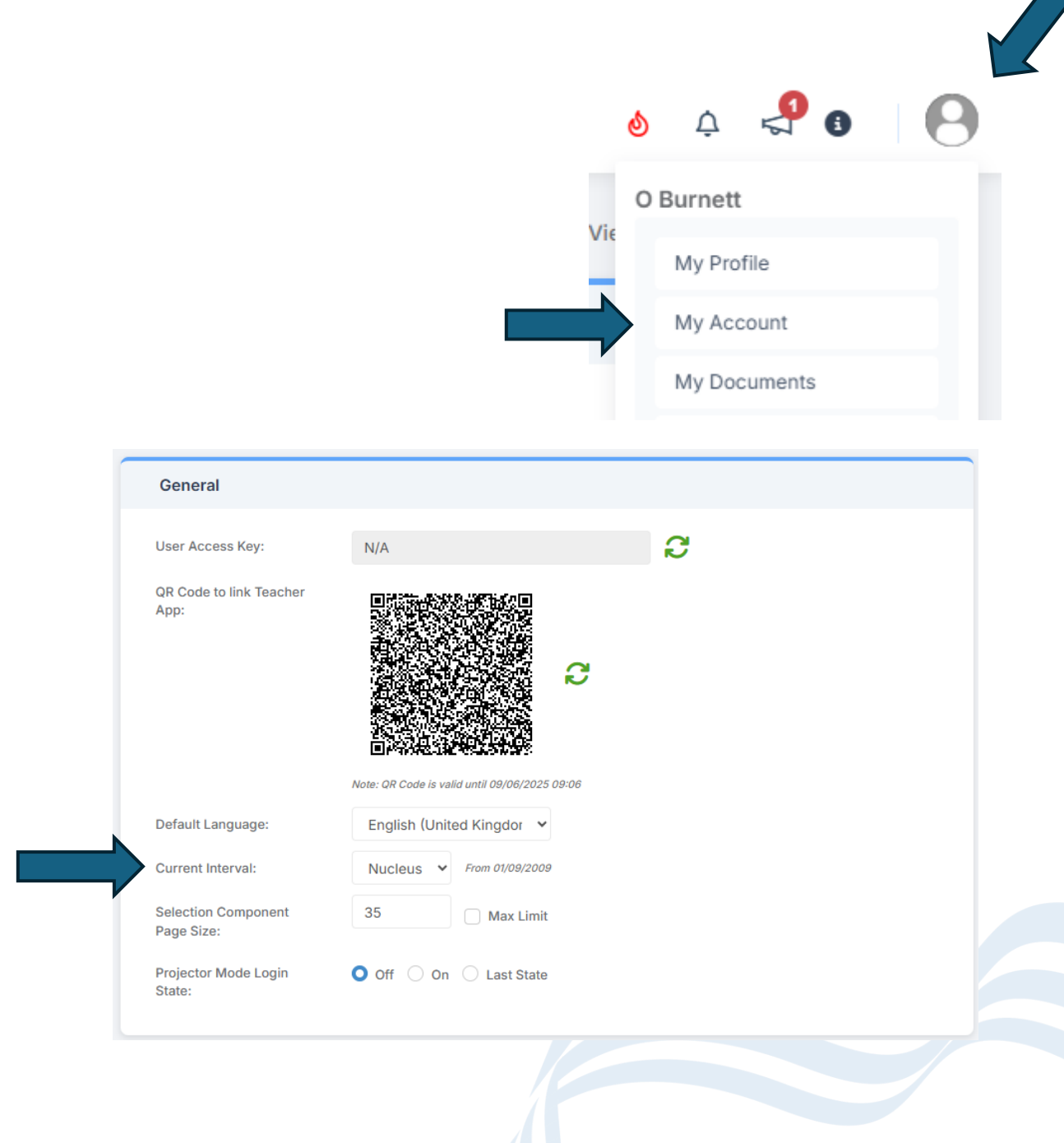
Task		Status	Help Centre	Link	Complete
Curriculum					
Are all students in a year group next year?		-	Assign Student Year Groups	Module > Curriculum > Assign Student Year Groups	<input type="checkbox"/>
Do any tutor Groups exist in the new academic year?		Yes	End of Year Guidance		<input type="checkbox"/>
Do ALL the correct Tutor Groups exist in the new academic year?		-	How to view existing groups	Groups > Select Group Type > Tutor Group	<input type="checkbox"/>
Do all Tutor Groups have the correct main tutor?		-	How to view existing groups	Groups > Select Group Type > Tutor Group	<input type="checkbox"/>
Do all Tutor Groups have AM/PM timetables?		No	How to Generate Tutor Group Timetables	Modules > Curriculum > Tutor Group Timetable Generator	<input type="checkbox"/>
Are all students in a Tutor Group?		-		Student List Page	<input type="checkbox"/>
MCAS & Student Portal					

Creating the new Academic Year




Interval Setting

- Ensure your current Interval on the May Account page is set to Nucleus.
- Click your profile option, then go to **My Account**.
- In the **General** panel, change the Interval to **Nucleus**
- Click **Save** when finished



New Academic Year : Notes

- **The system will automatically set the start date for the new academic year, to the day immediately following the end of the last year. This is correct.**
 - The End Date of the current year may need to be changed. In Bromcom all calendar weeks need to begin on a Sunday and end on a Saturday. This year the last Saturday in August is 30th.
 - To change the next year's start date, you will need to edit the End Date of the last academic year.
- 

Coventry Term Dates

Autumn term

Tuesday 2 September 2025 to Friday 19 December 2025

October Half Term Holiday

Monday 27 October 2025 to Friday 31 October 2025

Spring term

Monday 5 January 2026 to Friday 27 March 2026

February Half Term Holiday

Monday 16 February 2026 to Friday 20 February 2026

Easter Holiday

Monday 30 March 2026 to Friday 10 April 2026

Summer term

Monday 13 April 2026 to Monday 20 July 2026

May Day Bank Holiday Monday 4 May 2026

Half Term Holiday

Monday 25 May 2026 to Friday 29 May 2026


Summer Holidays begin

Begins Tuesday 21 July 2026



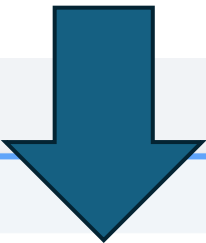
Create your new academic year

The academic year defines the basic structure of the new year, e.g. Terms. It does not set the days when school is open, that is done in a following step.

1. **Config > Curriculum > Academic Years**
 2. Check that it doesn't already exist
 3. If it doesn't, click **New**
- 

Create new academic year (continued)

- Enter the dates.
- End date is the last day of august.
- Start date is always a Sunday and the end is always a Saturday
- Name the terms as you desire.
- Click **Create** when done.




Create **Cancel**

New Academic Year

Start Date* 31/08/2025 End Date* 29/08/2026 ⓘ

Number of Terms* 3 ▼

Terms	Name*	Start Date*	End Date*
1	Term 1	31/08/2025	03/01/2026
2	Term 2	04/01/2026	28/03/2026
3	Term 3	29/03/2026	25/07/2026

Period Structure AMPM ▼ Colour Code  ▼

Timetable Day for first week day of Term 1 ▼ TT Week N/A

The process may take a while

Academic Year Setup : Enter Holidays and Inset Days

1. **Config > Curriculum > Academic Days**
2. Choose the academic year from the drop down
3. Expand each term
4. Click the Edit button next to the week in which you want to add a closure.
5. Enter the correct code for the specific day of the week. E.g. \$ for inset day or # for holiday. Make sure – is entered for each day school is open.

Week 4, Term 1 25/26

Day Status:
(-) Normal School Day; (\$) Staff Only; (!) Enforced Closure; (#) Holiday; (*) Not part of Term

Day	Date	AM	PM	TT Day	Lock
Sun	21/09/2025	*	*	-	<input type="checkbox"/>
Mon	22/09/2025	\$	\$	-	<input type="checkbox"/>
Tue	23/09/2025	-	-	2	<input type="checkbox"/>
Wed	24/09/2025	-	-	3	<input type="checkbox"/>
Thu	25/09/2025	-	-	4	<input type="checkbox"/>
Fri	26/09/2025	-	-	5	<input type="checkbox"/>
Sat	27/09/2025	*	*	-	<input type="checkbox"/>

☐ Cascade Timetable on Save

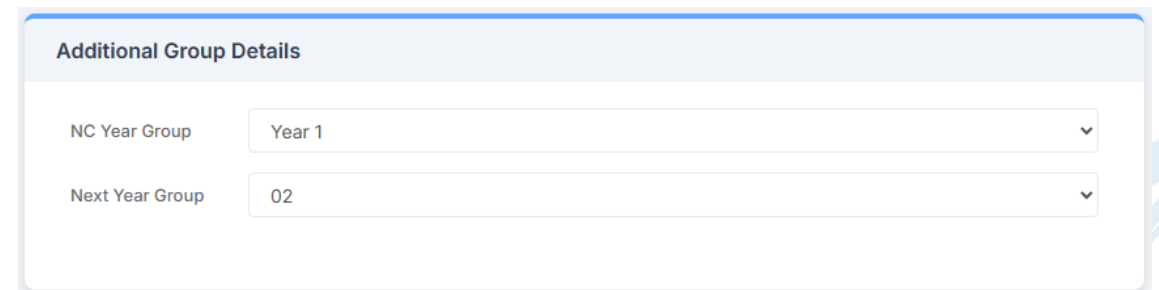
☐ Cascade changes only within this term ☐ Cascade changes in this term and all subsequent terms

☐ Treat designated Holidays, Staff Only Days etc as part of the timetable sequence

☐ Skip Non-Academic Weeks

Promoting Year Groups : Checks

- Before you start, you must ensure that each year group has a next year group linked to it.
- Go to **Groups > Group Type > Year Group**
- Change the View to Year Groups
- Open Each Year group in turn and ensure that the Additional Group Details Panel displays where the group will promote to. In the **Next Year Group** drop down,
- Note: Year 6 will promote to Year 6



The screenshot shows a panel titled "Additional Group Details". It contains two rows of information:

Additional Group Details	
NC Year Group	Year 1
Next Year Group	02

Promoting Year Groups

- When you have finished your checks, go to **Config > Curriculum > Year Group Promotion**

Year Group Promotion



Select the Academic year from which you want to promote the Year group memberships

Promote from


By Default this will promote all the students

☐ Create bands matching those in the current year, including memberships

☐ Include staff memberships e.g. Head of Years

Active On  

Promoting Year Groups (2)

- There are two options on the following dropdown menu:
 - **Add to any existing Memberships** preserves any memberships that may have been added to the Year Group for next year by other means, for example, a new student that has been added to the system manually with a future start date in September.
 - **Overwrite all existing memberships** will delete any existing memberships in the year group for next year and replace with those being promoted.
- 

Promoting Year Groups (3)

There are two additional checkboxes, tick these to:

- **Create Bands matching those in the Current Year, including Memberships**, generally not used in Primary Schools. So, you can ignore this option.
- **Include staff memberships** e.g. Head of Years, where Head of Years are moving up with the Year Group. If staff have 'tracks group end date' in which case their membership will just continue with the same year Group.



Promoting Year Groups (4)

Finally, the Active On selector allows you to pick the date that Year Group memberships will be taken and promoted from.

It is CRUCIAL that this is set to a Date in the CURRENT Academic Year before September, when the Students are still in their CURRENT Year Groups.

This allows the Students to be Promoted into the correct/next Year Groups in the new Academic Year.

Promoting from a Date within the new Academic Year will not work



Promoting Year Groups (5)

- Once you have reviewed and set each option, click **OK** to perform the migration.

✓ OK

Year Group Promotion

Select the Academic year from which you want to promote the Year group memberships

Promote from

24/25

Add to any existing membershi

By Default this will promote all the students

☐ Create bands matching those in the current year, including memberships

☐ Include staff memberships e.g. Head of Years

Active On

09/06/2025

Promoting Tutor Groups

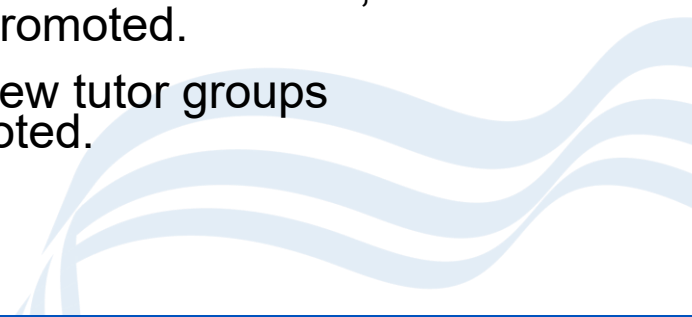
Google/Office 365 Integration

- If you are using Google/O365 Integration, then you must End Date all Tutor Groups.

Mixed/Vertical Tutor Group

- You do not need to promote Mixed/Vertical Tutor Groups, the Groups can remain unchanged without an End Date.
- Student Memberships can be amended via the Student Memberships panel of the Tutor Group itself. The memberships can be transferred to a new tutor group with the relevant future start date via the Actions column to the right-hand side.

Non-Mixed Tutor Groups

- **Tutor Group Names remaining the same** - your tutor groups can be left without an end date, so the groups remain active year on year allowing student memberships to be promoted.
 - **Tutor Group Names changing** - your tutor groups must be end dated and new tutor groups created for the new academic year. Student memberships can then be promoted.
- 

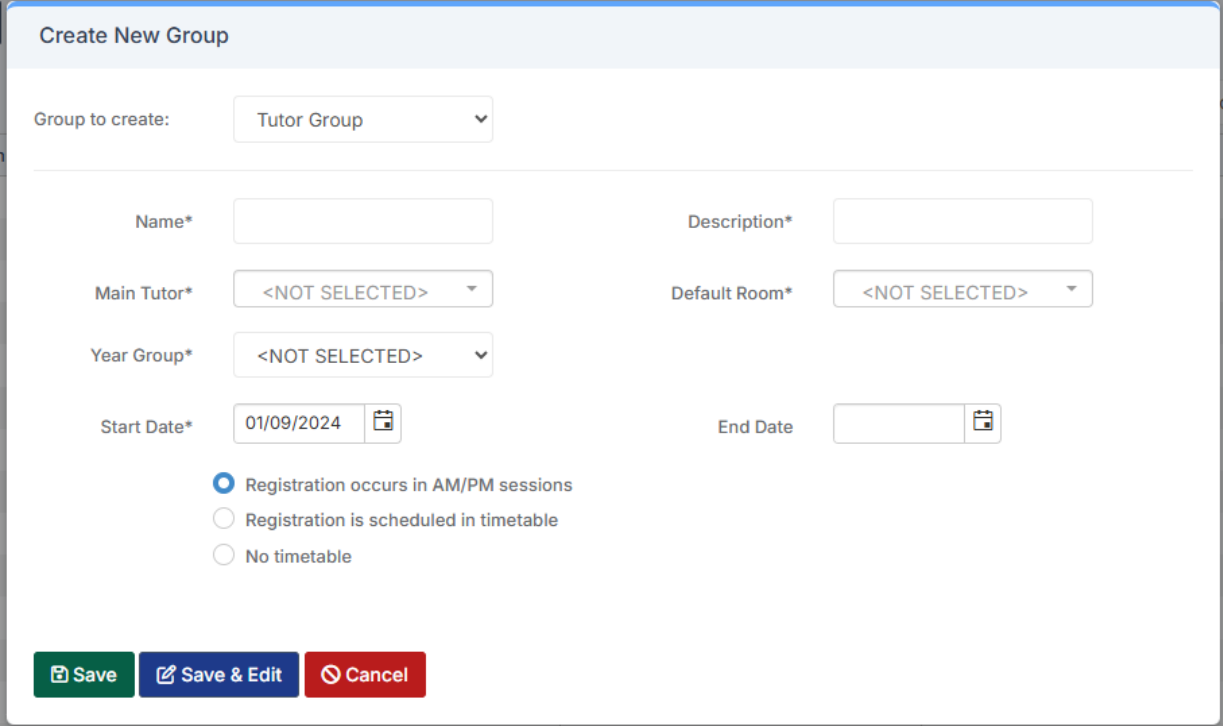
Promoting Tutor Groups (2)

- If your current 24/25 Tutor Groups are ending, and you are not going to continue using the SAME groups next year, please ensure that they have an End Date that is BEFORE the Start Date of the New Academic Year and that these Dates do not overlap.
- You should also ensure that you have created the new tutor groups before starting this process.



Creating New Tutor Groups

- If you need to create new groups.
- Go to **Groups**
- Click **New**
- Enter a name, description, choose the class teacher as Main Tutor and start the group on **01/09/2025**
- Click **Save**

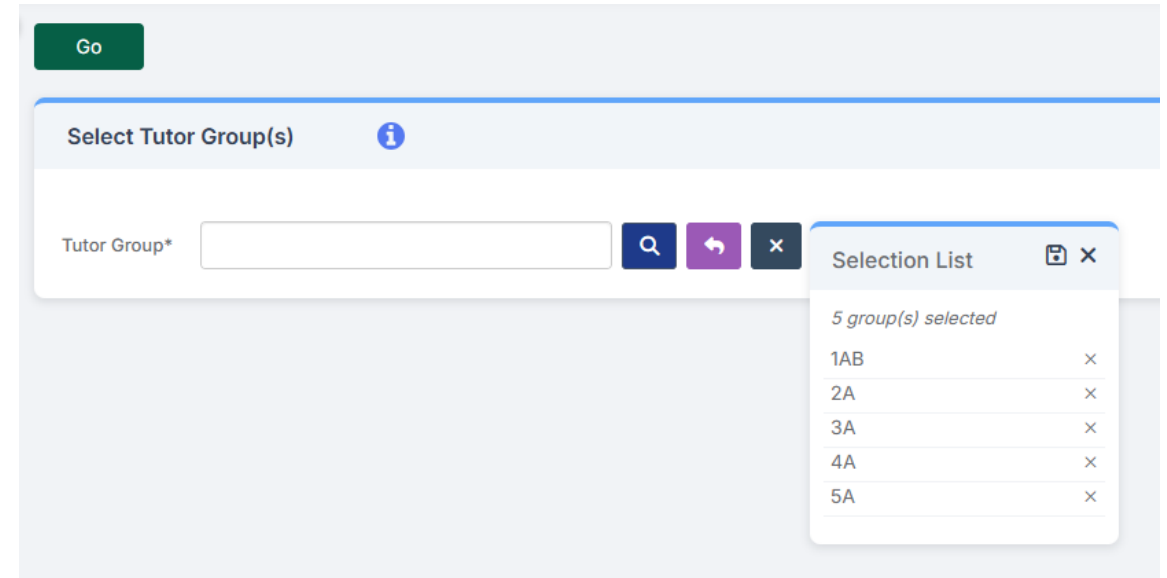


The screenshot shows a 'Create New Group' form with the following fields and options:


- Group to create:** A dropdown menu with 'Tutor Group' selected.
- Name*:** A text input field.
- Description*:** A text input field.
- Main Tutor*:** A dropdown menu with '<NOT SELECTED>' selected.
- Default Room*:** A dropdown menu with '<NOT SELECTED>' selected.
- Year Group*:** A dropdown menu with '<NOT SELECTED>' selected.
- Start Date*:** A date input field showing '01/09/2024' with a calendar icon.
- End Date:** A date input field with a calendar icon.
- Registration options:** Three radio buttons:
 - ☒ Registration occurs in AM/PM sessions
 - ☐ Registration is scheduled in timetable
 - ☐ No timetable
- Buttons:** 'Save' (green), 'Save & Edit' (blue), and 'Cancel' (red).

Promoting Tutor Groups (3)

- **Config > Curriculum > Tutor Group Promotion** and click the blue spy glass
- Click on the Tutor Groups you wish to Promote and click the top right **Done** button.
- The Tutor Groups will now show in the Selection List, once you are happy with the list click the top left **Go** button



Promoting Tutor Groups (4)

- Then either click on the Generate button for the system to suggest a name for the Next Tutor Group OR Type in the Next Tutor Group name yourself.
 - Tip: You can select all Tutor Groups and click Generate and then type over the suggested Tutor Group name if required.
 - **IMPORTANT: Please keep in mind that this process will create brand new tutor groups if it cannot find an existing group with the same name. Therefore, if your tutor group names are remaining unchanged with no end date, please ensure that the names added into the next tutor group field match exactly.**
- 

Promoting Tutor Groups (5)









You can use **Generate** button to get an assumption for the next collection name

Generate

 **Clear**

<NOT SELECTED>



<input checked="" type="checkbox"/>	Year Group 	Band 	Tutor Group Name 	Next Tutor Group	Next Band
	01		1AB	2AB	<NOT SELECTED> 
	02		2A	3A	<NOT SELECTED> 
	03		3A	4A	<NOT SELECTED> 
	04		4A	5A	<NOT SELECTED> 
	05		5A	6A	<NOT SELECTED> 

Promoting Tutor Groups (6)

- The changes can either be saved by clicking on the Save button and promoted later, or you can move straight to the next step and click Promote to continue.
- In the next screen you can choose to exclude any of the Groups by deleting them from the list using the Red Delete button.



Tutor Group Promotion

Select the Academic year which you want to promote the Tutor Groups to and the date they should start

Promote To

25/26



Start Date*

31/08/2025



End Date

29/08/2026



The latest membership of each group will be promoted to the corresponding new group.

This will transfer the current membership, where the group is still in use, or the membership as it stood on the group's end date, where the group is no longer active in the system



Add to any existing memberships



Overwrite all existing memberships

Student memberships are included by default, select others as required below:



Maintain House Memberships linked to former Tutor Group



Include Staff Memberships e.g. Main Teacher and any Assistants



Include Room(s)

	Year Group	Band	Tutor Group Name	Next Tutor Group	Next Band
	01		1AB	2AB	
	02		2A	3A	
	03		3A	4A	
	04		4A	5A	
	05		5A	6A	

Promoting Tutor Groups (7)


- Select the Academic Year you will Promote To from the dropdown list and set the appropriate Start Date* and End Date you wish to give your Student Memberships for the next Academic Year

Tutor Group Promotion

Select the Academic year which you want to promote the Tutor Groups to and the date they should start

Promote To	<input type="text" value="25/26"/>	
Start Date*	<input type="text" value="31/08/2025"/>	End Date <input type="text" value="29/08/2026"/>

Promoting Tutor Groups (8)


- As with Year Groups, you can Add to existing memberships (default for safety) or Overwrite all existing memberships (if promoting to pre-existing Tutor Groups please be aware that the overwrite feature will remove all current memberships that exist within the date range set above).
 - Clicking on the **Go** button will create new group memberships based on the groups they were being promoted from, and the old memberships will be given an end date at the end of the current academic year, if they did not already have one
- 

Promoting Tutor Groups (9)


- Note: If you plan to merge two Tutor Groups (e.g., 1A1 and 1A2 into 2A), note that you cannot assign both to the same new group name in a single promotion round - duplicate names are restricted for safety reasons. Instead, promote one group first, then run a second promotion to move the other group into the same new Tutor Group.



Adding Tutors To Tutor Groups

- This step is important as it will define who takes the register. You can assign more than one staff member to the group.
 - Go to Groups and chose Tutor Group from the drop down.
 - Open each tutor group in turn and make your changes – repeat these steps for each group.
 - Open the group up.
 - Go to the Associated Staff Panel and click Add New Record.
 - Choose the member of staff and then click the tick to save the record.
- 

Generating Timetables

- This step is important as it generates the
 - Go to **Modules > Curriculum > Tutor Group Timetable Generator**
 - Select the Start Date and End Date that you want the Timetable to run for and the Tutor Groups that you want to Create the Timetable for. E.g. The whole academic year.
 - Then click **Apply**
 - A confirmation message will display.
- 

Setting up MyChildAtSchool for next year



MCAS General Settings

- Go To **Config > MyChildAtSchool > General Settings**
- In the setting 'Academic Year Data to Display in MCAS'" click to display the academic year 25/26 or ALL. You probably want to keep the academic year 24/25 ticked otherwise parents/careers won't be able to view that data.
- When finished click **Save**

Academic year data to display in MCAS

Select which years you wish MCAS users to have access to (Default is set to ALL) If Academic Year has not been selected on User Defined section, system will automatically set ALL option

☒ All ☐ User Defined

☐ 10/11 ☐ 11/12 ☐ 12/13 ☐ 13/14 ☐ 14/15 ☐ 15/16 ☐ 16/17 ☐ 17/18 ☐ 18/19 ☐ 19/20 ☐ 20/21 ☐ 21/22 ☐ 22/23 ☐ 23/24 ☐ 24/25 ☐ 25/26

Allow Self Sign Up To MCAS


- This can be useful for your new starters. It allows parents/carers to register for their own MCAS account if you have their email address stored on their contact register.
- From the MCAS General Settings Screen, click the **Enable Self-Up for Parents** check box.
- Click **Save** to save your changes



Enable Self Sign-Up for Parents



Generate Accounts for Parents

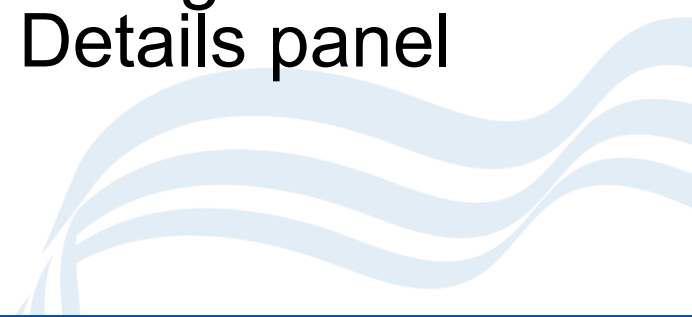
- To create User Accounts for your new Students, go to **Modules > MyChildAtSchool > User Accounts**.
 - From the User Account Maintenance page click **New** to get to the **User Account Creation** popup.
 - Choose Select Students to see a list of the Students that are not linked to an MCAS Account
 - Select the required Students and click Next
 - **Important: Manual or Auto: If you are creating several Accounts at the same time, select the Auto radio button. If you want to create Accounts for only one Student, you can select either Auto or Manual.**
- 

Generate Accounts for Parents (2)

- Once you press Generate, you will receive a success notification and you will see a list of the Contacts who now
- have an MCAS Account, click Send Generate Password Email.



Clubs, Trips and Wraparound Care


- To create your clubs/trips for next year, firstly you must ensure that the new academic year has been created (dates and academic days can be changed later if not yet known exactly).
 - For trips ensure that the end date of the group falls after the trip itself takes place, ideally giving enough time for all payments to be chased/collected. You may encounter issues if trying to process payments once the end date of the group has passed.
 - We recommend removing the Trip from MCAS once all parents required have signed up. This can be done by removing the 'Live on MCAS' dates within the Additional Group Details panel of the Trip.
- 

Trips that span academic years

- Some schools create trips in one year to allow parents to pay into the next year – to help with budgeting.
- If you are doing this, you can use one trip record on Bromcom for the whole process – you do not need to setup a trip this year and then another next year.
- Trips can span academic years – as long as the academic year is setup before you start.



Wraparound Care

- When setting up a Wraparound Care (Running Balance) club, we recommend not entering an end date initially. This allows the club to be reused across academic years without needing to recreate it each time. If you decide to close the club in the future, you can do so using the Terminate Club button in the Basic Group Details panel.
 - Most schools do not have an end date on their wraparound care, this is correct. You DO NOT need to create a new one.
 - **Important: Once an end date is set, it cannot be removed, meaning you'd need to create a new one -requiring any outstanding balances to be manually transferred. By keeping the same club active and simply updating the schedule each year, all balances remain intact and usable.**
- 

Finance Processes


For LA Maintained Schools



Month End Checks



Guide
available!


- **System Checks** - Run and respond to the errors
 - **Journal Browser** - check for errors and report these.
 - **Accounts Receivable** – check invoice receipts have been matched to invoices.
 - **Creditor Control Accounts** – ensure this matches aged creditor and outstanding invoices/credit notes.
 - **Debtor Control Accounts** – Ensure your debtor control matches your aged debtor report and outstanding invoices /credits.
 - **VAT Reports and VAT Control** – run, submit and check the VAT control ledger.
 - **Back Reconciliation** – do this monthly.
 - **Chart of Accounts** – Check that COA matches the Cost Centre Enquiry
 - **Trial Balance** – Check your trial balance is £0.00
 - **Online Payment Mapping** – Complete any outstanding ones.
- 

Dinner Money

Dealing with Dinner Money for leavers



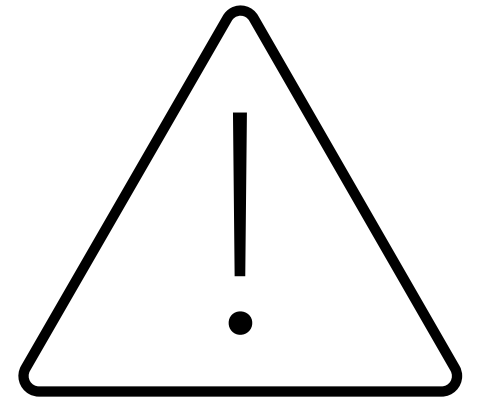
What are your options?

- For money owed to parents:
 - Refund to a payment card
 - Make a BACS or Cheque Payment to the Parent
 - Refund from Petty Cash (if you use Petty Cash in your school)
 - Transfer the balance to a sibling
 - Transfer the money into school funds (where the parent does not wish the money to be refunded to them).
 - For students in debt
 - Write off
 - Add payments
- 

Before you start

Before carrying out any of these processes, it is vitally important that your current Dinner Money balances are up to date.

You should ensure that you have confirmed all meals from the student list **Actions > Confirm Dinner Numbers** and you have added and confirmed all cash payments onto the system **Student List Actions > Confirm Dinner Payments**



Other considerations

- Before writing off any amount of dinner debt, you should consult with and obtain permission from your Headteacher and School Finance Officer
- Before transferring outstanding funds to siblings, school fund or other debt you should consult with the payer directly.
- Refunds to credit/debit card will incur the transaction charge on the refund also. This means refunds may cost you money.



Documents available


- We have two documents available which cover these scenarios:
 - Bromcom Dinner Money for Leavers
 - Bromcom Dinner Money Debt – how to clear
- These two documents will be circulated with the recording and these slides.



Pupil Data



Adding New Pupils


- There are three ways
 - Manually (Student List > New)
 - Via CTF (if arriving from another school in England)
 - Via ATF (if new intake)
- 

CTFs

- CTFs can be imported via the Student list Actions > CTF Import
- CTFs can be exported via the Student list Actions > CTF Export
- When sending CTFs for leavers these can be done at anytime – including before the child has left your school. You can also do CTFs multiple times.



ATFs (Admissions and Transfer File)

- Provided by the LAs system and can be used to populate your system with your new intake.
 1. Create a Pre-Admission Group
 2. Import the ATF via the Student's List. Actions > ATF Import
 3. Choose the required options (screen shot next slide)
 4. Select the pre-admission group to place the students into.
 5. Turn off the options that you don't require.
 6. Complete the Import
- 

ATF Import

Select the file that you want to import from and then complete the choices below

 **Browse** Choose a file

- | | | |
|--|---|---|
| <input checked="" type="checkbox"/> Student Basic Details | <input checked="" type="checkbox"/> Student Contacts | <input checked="" type="checkbox"/> Student Addresses |
| <input checked="" type="checkbox"/> SEN Information | <input checked="" type="checkbox"/> Looked After | <input checked="" type="checkbox"/> School History |
| <input checked="" type="checkbox"/> Student Optional Identifiers | <input checked="" type="checkbox"/> FSM History | <input checked="" type="checkbox"/> NAW Details |
| <input checked="" type="checkbox"/> Early Years Foundation Stage | <input checked="" type="checkbox"/> Y1 Phonics Check Data | <input checked="" type="checkbox"/> Student Siblings |
| <input checked="" type="checkbox"/> Key Stage 1 | <input checked="" type="checkbox"/> Key Stage 2 | <input checked="" type="checkbox"/> Key Stage 3 |

In case of existing students, use ATF to:

Complete Missing Data

Select the text format to apply to names:

Use Initial Capital Letters for all

Pre-Admission Groups*


<NOT SELECTED>



Enter Admission Date


11/02/2025



 Cancel

Next →

Notes About ATFs

- Can be useful for populating your system with the new students.
 - ATF will contain all applications that have been awarded a place. You will need to delete those that don't take up their place.
 - ATFs will contain the information used by the parent when applying for a school place. This can create some duplicate contact details.
 - Use with Caution.
- 

Leavers

- To process leavers, to go **Student List**
- Select the students that you want to make leave.
- **Actions > Process Leavers**
- Review the list of leavers.
- Enter a leaving date, reason and any further information. You may also choose to remove attendance records after leaving date – this is helpful if you have pre-filled in attendance records for some reason.
- You can also choose to produce a CTF here also. If you choose to create a CTF all students must be going to same school, you can run this process multiple times for different groups of students.

Dealing with Admissions



Detailed Guidance

- Admissions is a complex module. This presentation can only go into limited detail, more information is available here
- <https://docs.bromcom.com/knowledge-base/summer-2025-admissions-guidance/>




Finalise Admissions

- **Modules > Administration > Finalise Admissions** & select the relevant pre-admission group from the drop down.
- Depending on the group you select, you should see your Pre-Admission Students in this group with a Pre-Admission number.
- There are now a few options you have which are determined by the **Action dropdown**.



Action Drop Down

- **Confirm all for admission** – Selecting this will **Admit all Students** in the **Admission group** as of the **Admission Date** of the group.
 - **Confirm all who have accepted a place** – Selecting this will **Admit all Pre-Admission Students** who have a **place accepted** on their **Record**. (To have a place accepted, the place offered must be populated.)
 - **Confirm Individuals** – Selecting this means you will need to **individually select** which **Students** you wish to **Admit** from the group.
 - **Withdraw confirmation from individuals** – If you have **Confirmed** a student but have not yet **Admitted** them, the students will appear under this option. You can select them and click **Update** they will then appear in **Confirm Individuals/Confirm All** and you can continue with finalising their **Admission**.
 - The two options most likely to be used will be **Confirm all for admission** or **Confirm Individuals**.
- 

Admitting Students

- Once the date is set correctly and the **Students** are selected, you can press **Admit** at the top of the page.
- **Pressing Admit** may then provide you with a confirmation message, depending on the **Maximum Intake** for the Year Group.
- Click **Proceed**.




Updating Behaviour

Only relevant to schools who are using the behaviour module



Updating behaviour

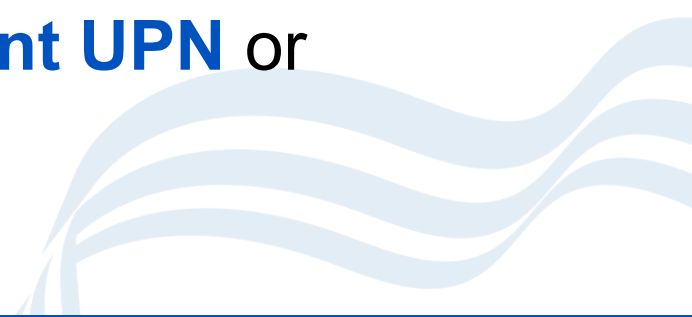
- If your school is using Behaviour and your setup needs to be updated for the upcoming academic year there is guidance available to follow.
 - For example, you may need to reset/restart points total for student actions, or you may need to expire any behaviour events or actions which are no longer required.
 - This guidance will be made available with these slides when they are published.
- 

Reporting Home to Parents

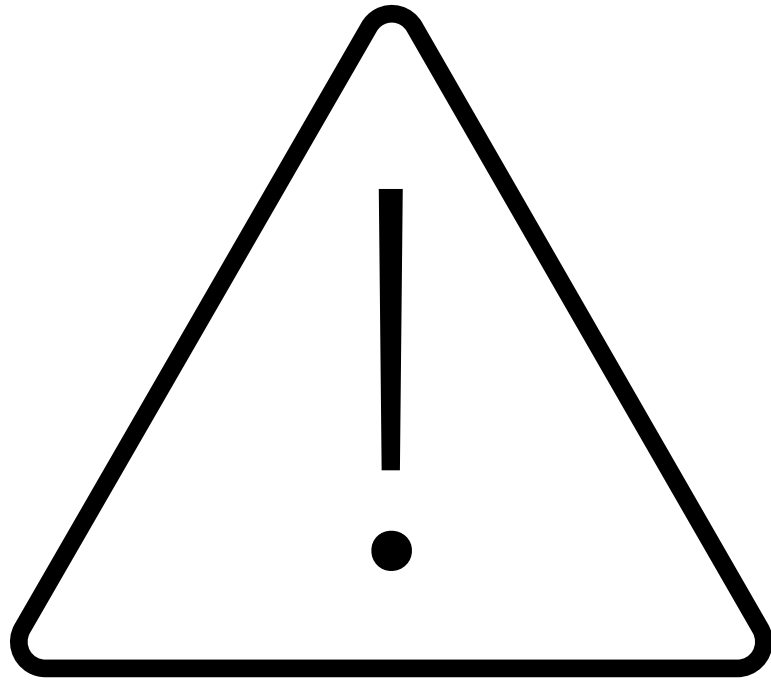
How to upload reports and other documents for parents.



Pre-Requisites

1. This section is relevant to schools who are using Bromcom to share reports NOT created in Bromcom with parents.
 2. Documents must be stored in a location that the **MIS can browse** to – e.g. a local drive. If using SharePoint or OneDrive you will need to **synchronise** the files to a local drive first.
 3. Documents must be the correct **type** and **size**
 4. The document name must contain either the **Student UPN** or **Admission number**.
- 

Data Protection Warning

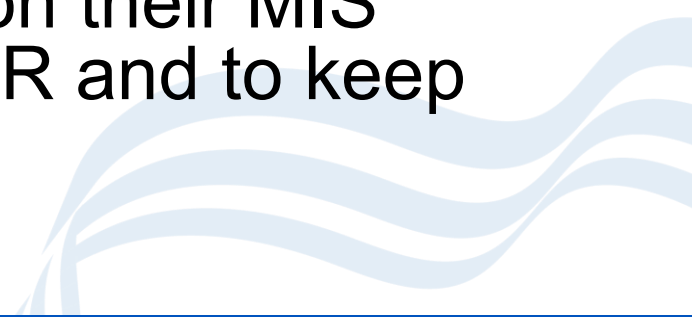


- Files will be matched on the **UPN** or **admission number** in the file name to a pupil in Bromcom.
- **If** a file contains **an incorrect number**, then it might be matched to the wrong child, which could lead to **a data breach**.
- **Double check** your file names before you start.

Document Types and Sizes

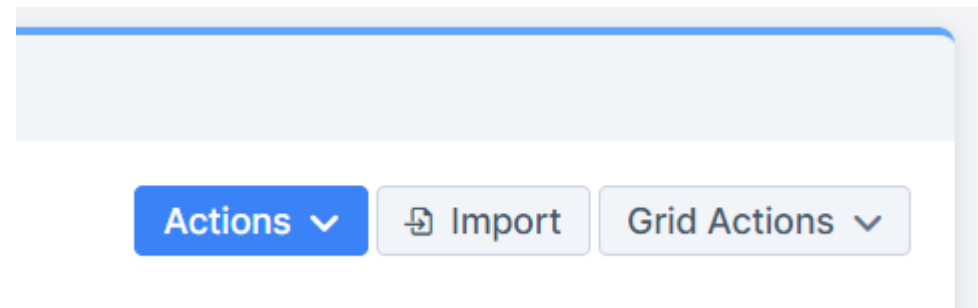
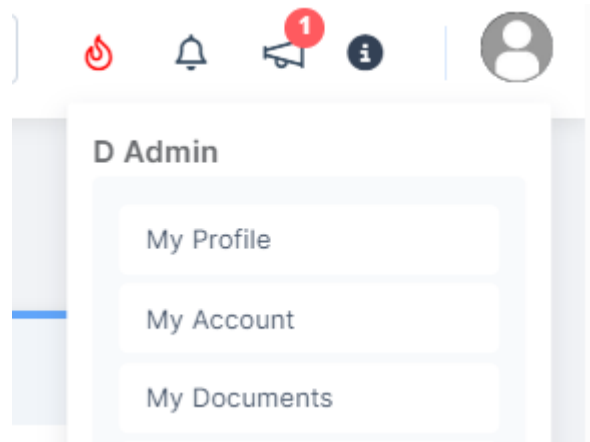
1. The supported file types are:
 - .pdf, .doc, .docx, .xls, .xlsx, .xml & .msg
2. The maximum file size for importing to the DMS is **5MB** (per file).

Note: Schools **do not** have unlimited storage on the DMS, so uploading excessive files may cost more money. Schools are encouraged to regularly undertake housekeeping on their MIS including the DMS to ensure compliance with GDPR and to keep unnecessary costs down.




Uploading Files

1. Log into **Bromcom** using an account that has the appropriate permissions.
2. Using the **My Account** icon (top right) click it and go to **My Documents**
3. Next click **Import**



Import Options

- **Step 1** – Select the matching criteria for the documents, select what the file name contains, either UPN or Admission number
 - **Step 2** – Select where in the filename the matching criteria appears, either at the start, end or somewhere in the middle (contains).
 - **Step 3** – Locate the files on your device and select them.
 - Click the blue upload files button and wait for them to be uploaded.
 - Choose if you want to publish the files to MCAS or (if applicable) the Student portal.
 - Click Next, files will be published immediately if you have selected the option.
- 

Check and Confirm

- The system will match the files with students in the database. You MUST review this list. **DO NOT PROCEED** IF FILES HAVE BEEN MATCHED INCORRECTLY.
- Once you have checked and you are happy, click **Import**

Matched results

2 out of 2 files successfully matched

Document Name :

Apply

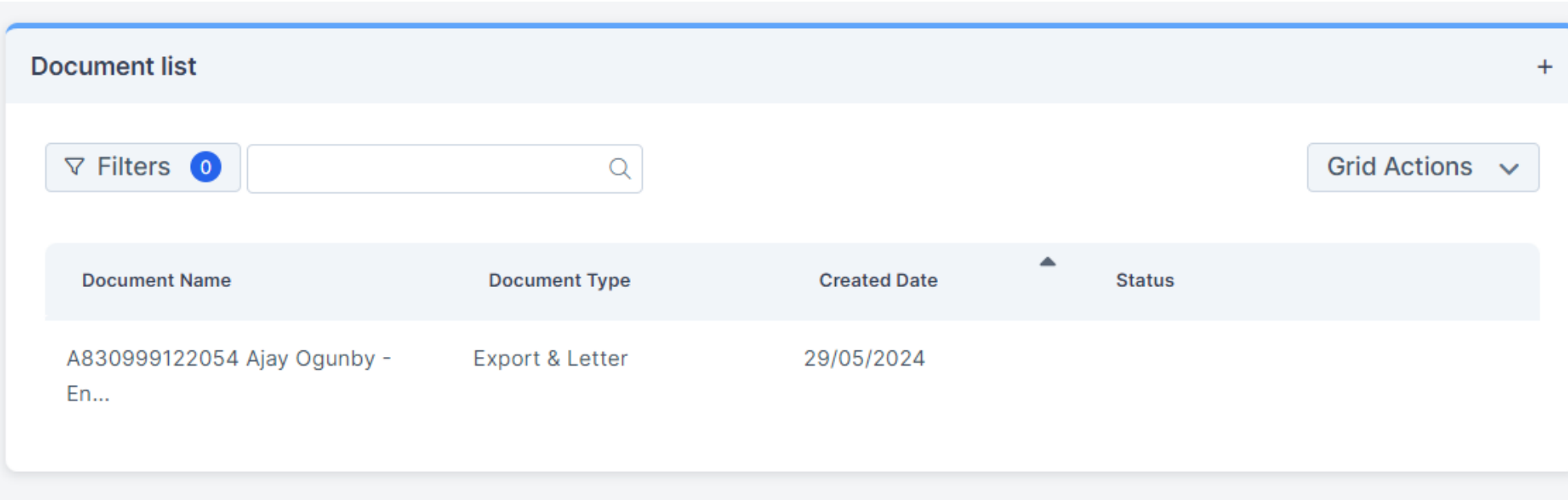
File Name	Student	Year	Admission Number	Document Name	1-1 1-M	Matched
N2209 Peter Addison End of Year Report 2024.docx	Peter Addison	02	N2209	<input type="text" value="N2209 Peter Addis"/>	<input checked="" type="radio"/> 1-1 <input type="radio"/> 1-M	✓
N8372 Harry Addison End of Year Report 2024 - Copy.docx	Harry Addison	05	N8372	<input type="text" value="N8372 Harry Addis"/>	<input checked="" type="radio"/> 1-1 <input type="radio"/> 1-M	✓

Import

Close

Locating files on Student Profile

1. Open a student profile
2. Click **Documents** on the left-hand side
3. Locate the document in the **Documents List**



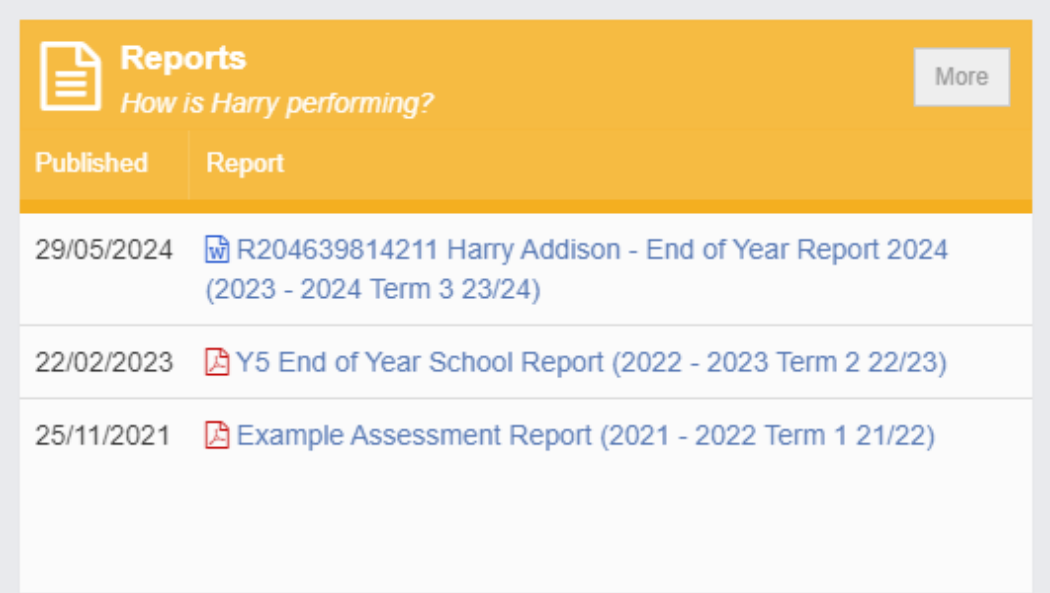
The screenshot displays a 'Document list' interface. At the top, there is a header bar with the title 'Document list' and a plus icon. Below the header, there is a search bar with a magnifying glass icon and a 'Grid Actions' dropdown menu. The main content area contains a table with the following columns: 'Document Name', 'Document Type', 'Created Date', and 'Status'. The table has one row of data.

Document Name	Document Type	Created Date	Status
A830999122054 Ajay Ogunby - En...	Export & Letter	29/05/2024	

Locating reports on MCAS

1. Open a pupil's MCAS by using the 'green jelly baby' on the Student profile.
2. Locate the **Reports Panel** or click the **Reports** menu on the left of the screen.

If you can't see the **Reports** panel you might need to enable it.

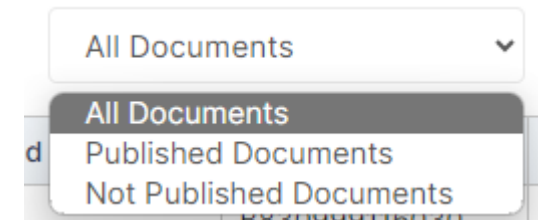


The screenshot shows the 'Reports' panel in the MCAS system. The panel has a yellow header with a document icon, the title 'Reports', and the subtitle 'How is Harry performing?'. A 'More' button is in the top right corner. Below the header is a table with two columns: 'Published' and 'Report'. The table lists three reports:

Published	Report
29/05/2024	R204639814211 Harry Addison - End of Year Report 2024 (2023 - 2024 Term 3 23/24)
22/02/2023	Y5 End of Year School Report (2022 - 2023 Term 2 22/23)
25/11/2021	Example Assessment Report (2021 - 2022 Term 1 21/22)

Publishing (or unpublishing) Files (1)

- You may not want to publish all your files at the same time, or you may want to unpublish some files.
- Go to **Modules > MyChildAtSchool > Published Documents**
- The page works on a simple basis, if the Document is ticked it is Published, if the Document is not ticked then it is not Published.
- You can filter the list by choosing from the drop down.



Publishing (or unpublishing) Files (2)

Use the date selector to filter the list by file created dates.

The drop down allows you to easily filter by published/unpublished files.

Accessible from allows you to hide a file until a certain date

Update Send Push Notification

Published Documents Settings

From: 03/05/2024 To: 03/06/2024 All Documents

Accessible From: 03/06/2024 Apply

<input type="checkbox"/>	Format	Originator	Created On	Document Type	Student	Admission No	Student...	Tutor Group	Published Date	Accessible Fr...
<input checked="" type="checkbox"/>	DOCX	D Admin	29/05/2024 17:19:48	B830999116030 Hetty Jones - End of Year Report 2024 .docx	Hetty Jones	N8339	6228	4 Ash	03/06/2024	
<input checked="" type="checkbox"/>	DOCX	D Admin	03/06/2024 18:42:42	A830999116008 Lois Maguire - End of Year Report 2024 .docx	Lois Maguire	N8340	6229	4 Ash	03/06/2024	

The tick means the file is published.

Publishing (or unpublishing) Files (3)

- To Publish a file, click the tick next to the file, then click **Update**
- To Unpublish a file, untick it and click **Update**

Update ☒ Send Push Notification

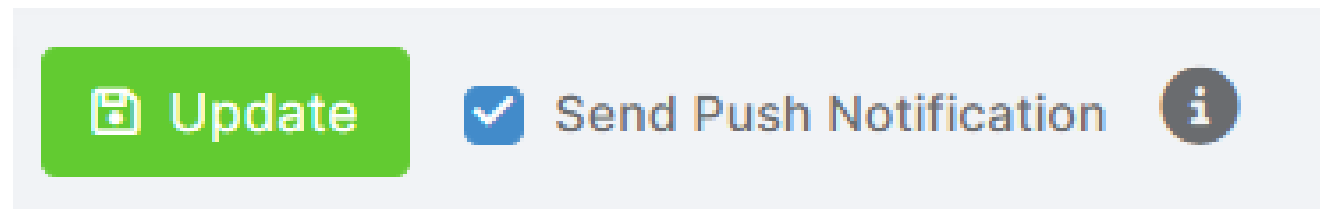
Published Documents Settings

From: 03/05/2024 To: 03/06/2024 All Documents Accessible From: 03/06/2024

<input type="checkbox"/>	Format	Originator	Created On	Document Type	Student	Admission No	Student...	Tutor Group	Published Date	Accessible Fr...
<input checked="" type="checkbox"/>	DOCX	D Admin	29/05/2024 17:19:48	B830999116030 Hetty Jones - End of Year Report 2024 .docx	Hetty Jones	N8339	6228	4 Ash	03/06/2024	
<input checked="" type="checkbox"/>	DOCX	D Admin	03/06/2024 18:42:42	A830999116008 Lois Maguire - End of Year Report 2024 .docx	Lois Maguire	N8340	6229	4 Ash	03/06/2024	

Publishing (or unpublishing) Files (4)

- If the Send Push Notifications option is ticked, a Push **Notification** will be **sent** only **once** a **Document** has been **Published**.
- Or a Push Notification will be sent at **9.00 AM** on the selected **Date** if the **Document** is **scheduled to be Published** for a date in the future.



Managing the DMS (1)

- Its good practice to manage the DMS from time to time, this includes:-
 - Deleting files which should no longer be stored. – e.g. no longer required or a GDPR requirement to delete.
 - Ensuring that the correct files are in place. Checking for any missing items.
 - Reduction in costs as schools are charged for the data they store.



Managing the DMS (2)

- Go to **My Profile > My Documents**

Storage Usage 15%

My Documents i


Filters 0 Q Actions Import Grid Actions

Drag here to set row groups

<input type="checkbox"/>	Status	Format	Created Date ↓	Created Time	Document Title	Focus	Category	Size	Expiry Date	Originator
<input type="checkbox"/>	Viewed		03/06/2024	18:42:42	A830999116008 Loi...	Maguire Lois		0.90 MB		Demo Admin
<input type="checkbox"/>	Exported		31/05/2024	08:51:01	Letter A		Reporting	0.05 MB	14/06/2024	Demo Admin
<input type="checkbox"/>	Exported		31/05/2024	08:55:01	Letter A		Reporting	0.35 MB	14/06/2024	Demo Admin

Managing the DMS (3)

It is important to understand the difference between **My Reports** and **My Documents**.

- **My Reports** – these are copies of reports that can be viewed again without having to re-run the report, for example, WebMerge Reports or Scheduled Reports. From here you can safely delete without it affecting the associated document that is already sitting on your DMS.
 - **My Documents** – these are the physical documents (i.e. PDF/Documents) which are created as part of the WebMerge process and are what sits against the student record and what parents download from MyChildAtSchool. The removal of the associated report in the My Reports area will have no effect on these documents.
- 

Managing the DMS (4)

- Primary Schools have by default **3GB** of storage.
- Additional storage can be purchased for a fee, please email schoolsict@coventry.gov.uk if you want to buy more storage.
- The amount of used storage is at the top of the My Documents screen.
- Use the filters on the My Documents area to filter the documents.
- Use the **Actions > Delete** to delete documents you no longer want to store.
- More information can be found here <https://docs.bromcom.com/knowledge-base/managing-the-dms/>
- **WARNING – Deleted documents cannot be retrieved.**

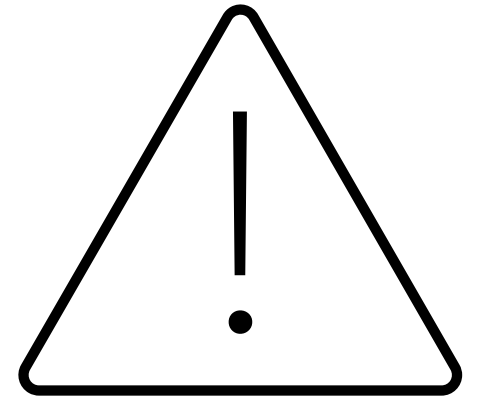
Housekeeping

Keeping your data tidy. These processes are mostly recommended by not mandatory




Data Archival


- This process will assist you with archiving the oldest Academic Year in your MIS and how to manage the DMS Storage linked to your MIS.
- This process is IRREVERSIBLE so please ensure you have reviewed the process carefully before completing.
- Contact Digital Services if you any questions: 024 7678 6620 or schoolsict@coventry.gov.uk



Data Archival (2)

- To see the previous Academic Years that have been archived on your system go to **Modules > Setup > Data Archiving**, it may show nothing if this is the first time you are performing this process.
 - The Archiving process, and which Academic Year will be processed, will be displayed on the Data Archive Configuration page. From here you can also review exactly what data will be archived and what will be permanently deleted from your MIS
- 

Data Archival (3)

- Once you have reviewed and are happy to proceed, you will need to enter your MIS Account Password before clicking on the **Archive Now** button
 - The process will run and take you back to the previous screen with a confirmation message at the top of the page. This will indicate that the process completed successfully and now you should see the Academic Year you have just archived in the Archive Years list.
 - You can also access reports on Archived Data from Reports> Quick Reports and select the Archived Data domain.
- 

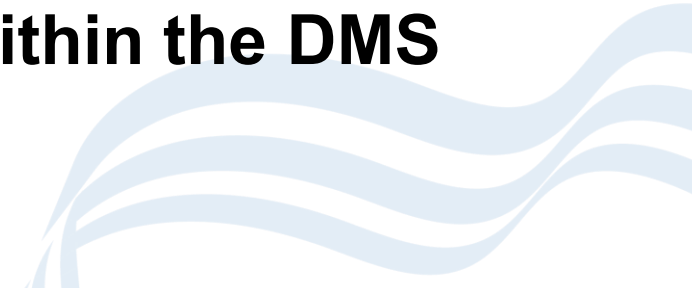
DMS Management

Managing the size of DMS can be done via the **My Reports** area. (Profile Link > My Reports)

It is important to understand the difference between My Reports and My Documents.

- My Reports – these are copies of reports that can be viewed again without having to re-run the report, for example, WebMerge Reports or Scheduled Reports. From here you can safely delete without it affecting the associated document that is already sitting on your DMS.
- My Documents – these are the physical documents (i.e. PDF/Documents) which are created as part of the WebMerge process and are what sits against the student record and what parents download from MyChildAtSchool. The removal of the associated report in the My Reports area will have no effect on these documents.

DMS Management (2)

- Click on your picture on the **top right of screen** to get the dropdown menu and select **My Reports**.
 - Click on the top left **Filter**
 - On the next page click on the Filter option and you will see an Originator dropdown menu, if you click on this, you will be able to see all the reports for specific Users or go to the top of the list and select Everyone to view all the reports for all Users in the MIS.
 - **Note: You will only see the option for Everyone within the DMS if you have the Administrator Role on Bromcom.**
- 

DMS Management (3)

- On this **Filter** page, there is also an option to show the **Archived** and **Not Archived** documents under the **Status** dropdown menu. You can also filter on date using the **Created between** date ranges
- By clicking on the top right **Actions** drop down you can choose to **Delete**, **Expire**, **Archive** or **Restore** the selected **Reports**.
- Delete reports which are no longer required. By default, primary schools have 3GB of storage. Additional storage is available for a charge.
- Further information can be found at <https://docs.bromcom.com/knowledge-base/managing-the-dms/>

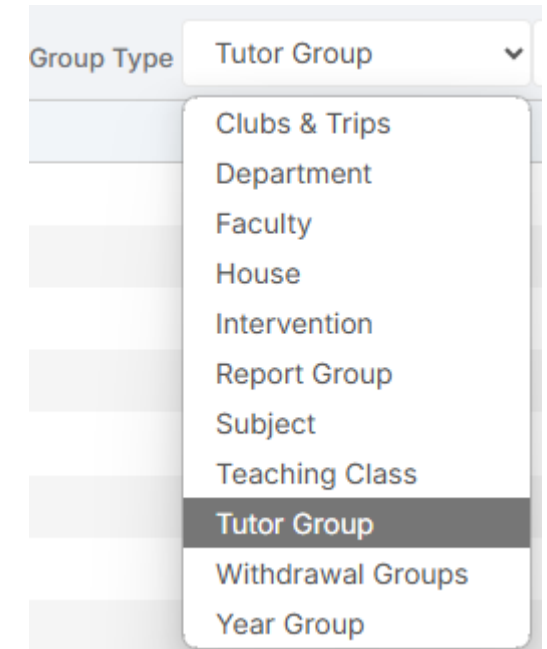
Managing Rooms

- Rooms are useful for Parents Evenings, and Tutor Groups.
- You can manage rooms through **Config > Administration > Rooms**
- Click the magnifying glass to look at and update existing rooms or use the purple new button to create a room.




Managing Groups


- Over the course of the year, you may have created many groups which now need to be end dated. These can be for trips/clubs, reports, tutor groups.
- To do this go to Groups and review the groups in each of the options, open any groups no longer needed and add an end date to or update the student membership.
- Remember to keep the history of a membership make sure you end date it rather than delete it.




Review your users

- It's a good idea at this time of the year to ensure that you have tidied up your users of the system. Remove or end date their access user accounts of any staff that are leaving.
 - **Modules > Setup > System Users (open the user)**
 - To remove a user's permissions to login, untick the button "The user can log into the system".
 - Check the users Roles and remove any which are no longer necessary.
 - Make sure to save the changes when you are finished.
- 


End Dating User Access

- From the user's screen “**Modules > Setup > System Users**” make a note of all the Roles that an individual user has.
 - Then go to Config > Setup > Roles and Permissions
 - For each role, the user has, select the dropdown menu and chose the role, then click Edit
 - Scroll down to the allocated user’s panel and edit the row to enter an end date.
- 


Check Integrations

- This is a reminder to disable user accounts for any third-party services that you are ceasing to use from the end of this year.
 - You can locate the third-party accounts being used from **Modules > Setup > Third Party Accounts**
 - These can then be disabled through Modules > Setup > User accounts in the same way as other user accounts.
- 

Remove Orphaned DMS Records

- Orphaned DMS records, are files which are no longer attached to a person record. These could be reports or other files which are no longer needed.
 - This can help save space on your DMS and save you money.
 - This process is irreversible, so please be sure you want to continue before you do so.
 - Bromcom doesn't show you the documents which will be deleted as they cannot be accessed.
- 

Remove Orphaned DMS Records

- **Config > Setup > DMS Settings**
 - Click **Check DMS**
 - The system will check the DMS to understand how many records are orphaned.
 - It may take a little while to calculate.
 - Click **Removed Orphaned Records** if you are happy to permanently delete those files.
- 

Address Validation

- Address validation can be used to tidy your addresses on the system. This step is semi manual and may need to be completed multiple times throughout the year.



Address Validation (2)

- Click **Modules > Administration > Bulk Address Validation**
- From the drop down menu you will have a list of postcode 'outward' codes. This is the first part of the postcode, e.g. CV2.
- Click one and Bromcom will list all of the addresses in the system which are not validated against that outward code.

Bulk Address Validation ⓘ

Please choose an outward code for validation:

B1 (1) ▼

NOTE: Value in brackets next to outward code shows the number of unvalidated addresses


Grid actions

Copy Excel CSV PDF Print

Address ID	Post Code	Flat Name /Number	Building Name /Number	Street	Locality	Town	Administrative Area	# of Records	Address Selection
4366	B1 2AA		123	fake street		birmingham		1	<NOT SELECTED> ▼

Address Validation (3)

- Review the list and use the drop-down menu on the right-hand side to chose the correct address.
- You are looking to see if the address in the dropdown matches the address listed, if it doesn't don't make a selection.
- Click Apply to save the changes.

Bulk Address Validation 

Please choose an outward code for validation:

B1 (1)

▼

NOTE: Value in brackets next to outward code shows the number of unvalidated addresses

Grid actions

Copy

Excel

CSV

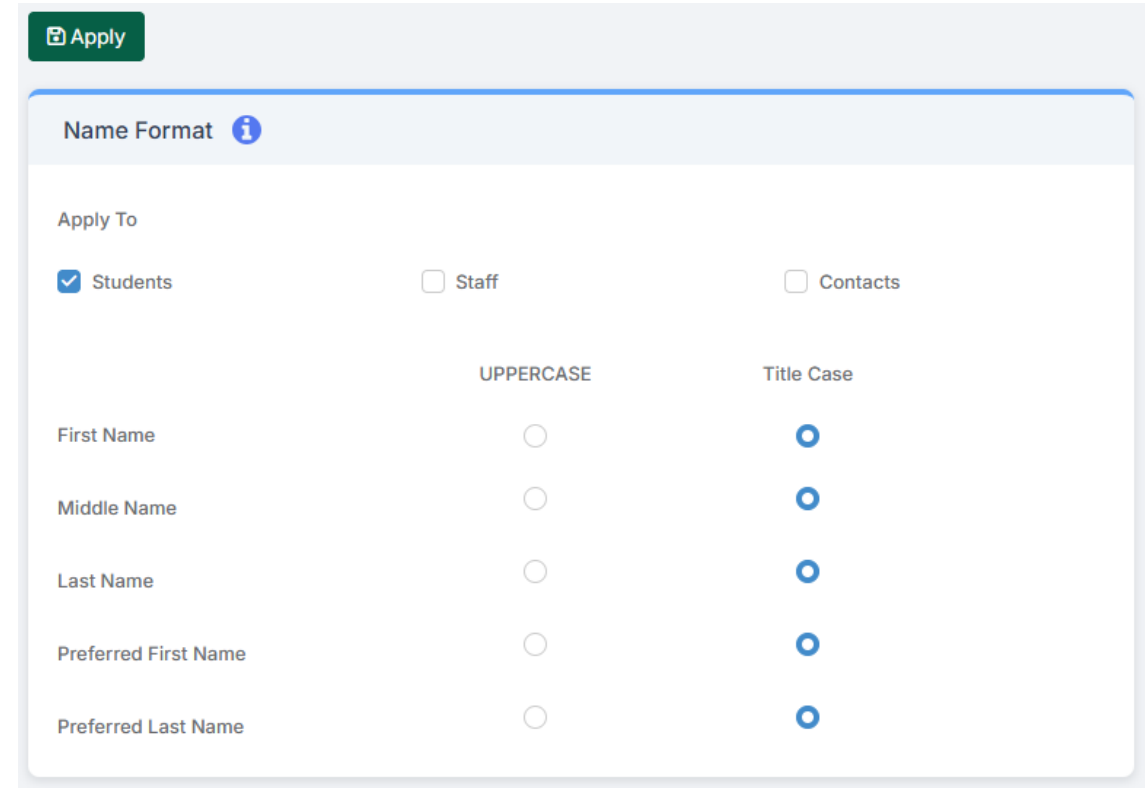
PDF

Print

Address ID	Post Code	Flat Name /Number	Building Name /Number	Street	Locality	Town	Administrative Area	# of Records	Address Selection
4366	B1 2AA		123	fake street		birmingham		1	<div><NOT SELECTED> ▼</div>

Name Formats

- This process allows you to change to UPPERCASE or Title Case names in your system.
- Click **Modules > Administration > Name Format**
- Choose the type of record you want the format to apply to and make your selection for UPPERCASE or Title Case.
- Click **Apply** to save your changes.

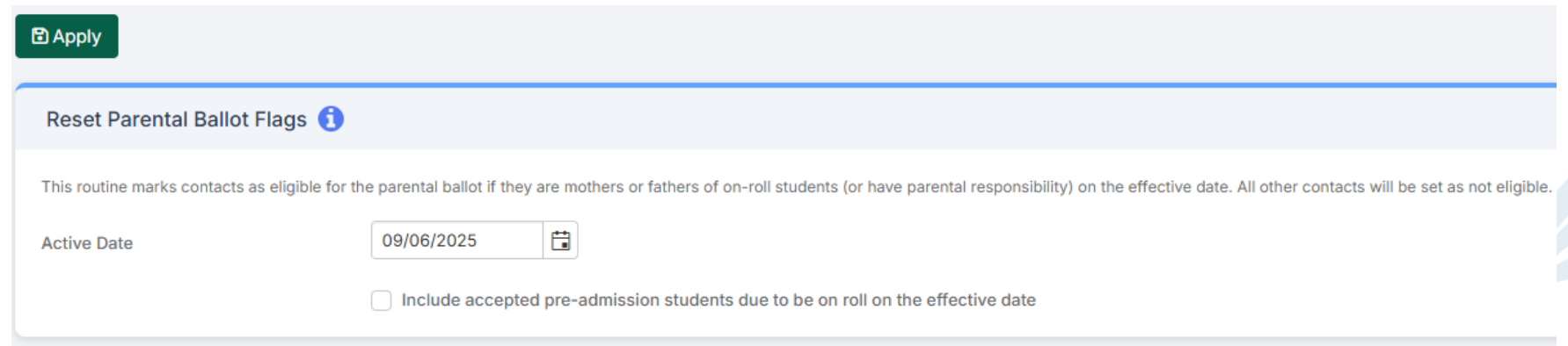


The screenshot shows a web interface for configuring name formats. At the top left is a green 'Apply' button. Below it is a 'Name Format' header with an information icon. The 'Apply To' section has three checkboxes: 'Students' (checked), 'Staff', and 'Contacts'. Below this are two columns of radio buttons for 'UPPERCASE' and 'Title Case'. The 'UPPERCASE' column has five radio buttons, all of which are unselected. The 'Title Case' column has five radio buttons, all of which are selected. The rows are labeled 'First Name', 'Middle Name', 'Last Name', 'Preferred First Name', and 'Preferred Last Name'.

	UPPERCASE	Title Case
First Name	<input type="radio"/>	<input checked="" type="radio"/>
Middle Name	<input type="radio"/>	<input checked="" type="radio"/>
Last Name	<input type="radio"/>	<input checked="" type="radio"/>
Preferred First Name	<input type="radio"/>	<input checked="" type="radio"/>
Preferred Last Name	<input type="radio"/>	<input checked="" type="radio"/>

Refresh Parental Ballots

- This process marks contacts as eligible for the parental ballot if they have parental responsibility on the effective date.
- Click **Modules > Administration > Reset Parental Ballot Flags**
- Enter an Active Date and select the box for all accepted pre-admission students.
- Click **Apply**



The screenshot shows a software interface for 'Reset Parental Ballot Flags'. At the top left is a green 'Apply' button. Below it is a header bar with the title 'Reset Parental Ballot Flags' and an information icon. A descriptive text block explains the routine's purpose. Below this is a form with an 'Active Date' label, a date input field containing '09/06/2025' with a calendar icon, and a checkbox labeled 'Include accepted pre-admission students due to be on roll on the effective date'.

Apply


Reset Parental Ballot Flags ⓘ

This routine marks contacts as eligible for the parental ballot if they are mothers or fathers of on-roll students (or have parental responsibility) on the effective date. All other contacts will be set as not eligible.


Active Date ⓘ

☐ Include accepted pre-admission students due to be on roll on the effective date

Update Salutations & Addressee

- This process updates the student's parental salutation and address fields.
 - Click **Modules > Administration > Salutation and Addressee**
 - Select all students using the magnifying glass.
 - Click the Update Parental Salutation and Update Parental Address boxes and click Apply.
- 

Update Mailing Points


- This routine identifies one pupil at each address as the mailing point. Other children at the same address will be marked as NOT the mailing point.
 - Click **Modules > Administration > Update Mailing Point**
 - Enter an Active Date and select if you want the Youngest or Oldest Child at an address to be the mailing point.
 - Click **Apply** to save the changes
- 

Start of Year


These processes must be completed
once the new year has started




Tasks which may need to be completed

- Adding in additional INSET days if these have now been set.
 - Admitting new pupils not already admitted and adding those to year groups and tutor groups.
 - Chasing CTFs from sending schools.
 - Creating CTFs for receiving schools.
 - Generate timetables for classes.
 - Creating new MCAS accounts.
 - Turning off academic years visible in MCAS
 - Dealing with left over dinner money debt or credit balances
- 

Tasks which may need to be completed continued...

- Deleting pupils who never arrived at school.
 - Processing any additional leavers
 - Creating new users for new staff members
 - Running Address validation, name formats or salutations updates if you have had new students
 - Update attendance information for missing marks and N codes for the summer term (if necessary).
- 

Attendance Codes for Part Time Pupils

- For Schools who have part time nursery pupils, you may want to flood fill the session where they are not expected to attend with the relevant code.
 - **Modules > Attendance > Bulk Attendance Update**
 - Choose the Class/Group and then choose the group using the magnifying glass.
 - Enter a start and end date. This will likely be the whole academic year.
- 

Attendance Codes for Part Time Pupils (2)

- If you have selected the AM group – meaning those children do NOT attend in the afternoon. Tick the recurrence pattern as all PM boxes.
- This will populate the system with marks for the sessions that are chosen.
- In the Attendance Mark Options box choose the code from the drop down. **E.g. X Non-comp school age absence**

Recurrence Pattern*		
All	AM	PM
Monday	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Tuesday	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Wednesday	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Thursday	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Friday	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Attendance Mark Options

Update With

Attendance Codes for Part Time Pupils (3)

- You can choose to Override Future Attendance Marks if required.
- Click **Apply** to save your changes.
- You will need to repeat this process for the PM attenders, and you may need to repeat it throughout the year if you have new starter.



Getting Help

- These slides and the video will be posted to our Video Library – <https://www.schoolsict.digital/bromcom>
- If you get stuck, have any questions or concerns, please log a ticket with us, call 024 7678 6620 or email schoolsict@coventry.gov.uk





ACCREDITED
SUPPORT

Thank you for your time