



End of Academic Year Using Bromcom



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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.




Agenda

- Preparing for Academic Year End
 - Where to get further help and support
 - End of Year Dashboard
 - Setting up the new Academic Year 2026/27
 - Year Group and Tutor Group Promotion
 - Processing pupil leavers
 - Additional tasks
 - MCAS
 - Housekeeping
- 


Preparing for academic year end

- Before starting:
 - Gather a finalised list of your new tutor groups for next year – ask SLT to provide them in alphabetical order.
 - Will Tutor groups next year retain the same name and / or same staff?
 - 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.
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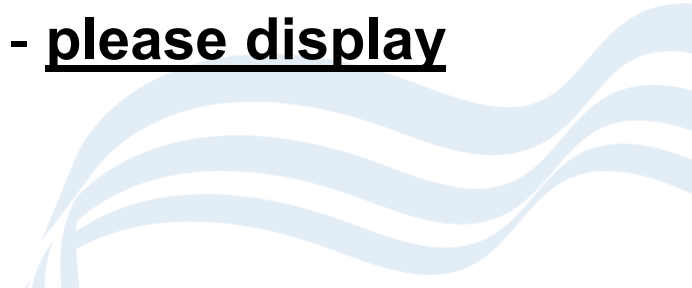
Help & Support

- [Primary End of Year Processes Guide 2026 – Bromcom – Documentation Centre](#)
 - Bromcom Help & Resources – Hot Topics
 - EOY Checklist
 - 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
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Drop In Sessions

- **Tuesday 23 June 2026** - Academic Year End workshop (in-person - **One Friargate**) 10-12 and 1-3
 - **Monday 29 June 2026** - Academic Year End workshop (in-person – **Cannon Park Primary School**) 10-12 and 1-3
 - Bring your laptop (fully charged)
 - Training laptops available if you need to borrow one
 - Please use this form to indicate if you will be attending a session: <https://forms.office.com/e/ktT5hSLtwX>
- 

Drop In Session – Location Info

- 23 June – One Friargate
 - One Friargate, Station Square, Coventry CV1 2FL
 - Meeting room 7.1
 - The nearest council car park is Coventry Railway Station (access from Eaton Road)
 - 1 minute from train station
 - 29 June – Cannon Park Primary School
 - Bransford Avenue, Coventry CV4 7PS
 - Parking is limited, you will need to park on the street.
 - Parking is restricted due to proximity to Warwick University - **please display the parking waiver code in your windscreen**
- 

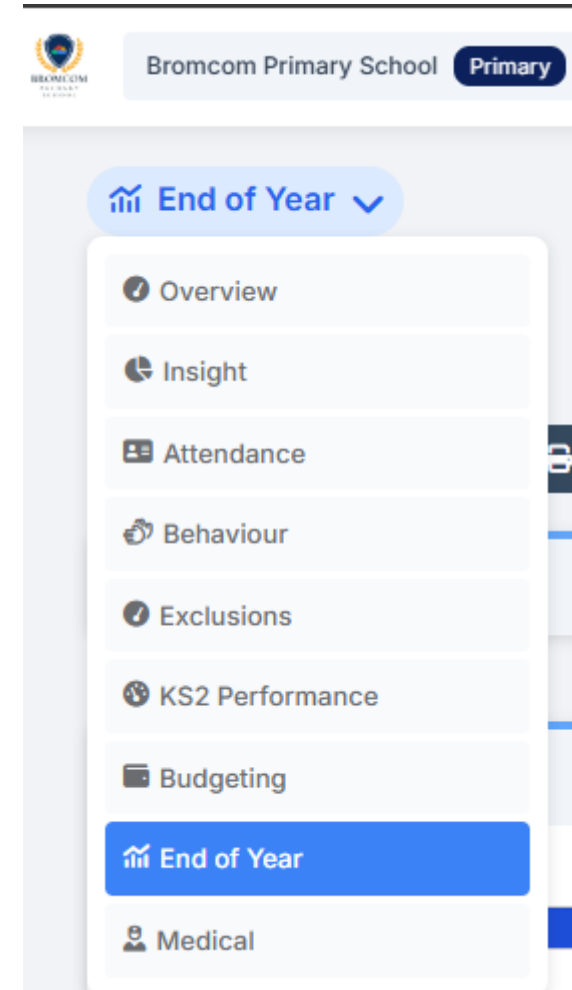
End Of Year

Do these processes before you finish for the summer



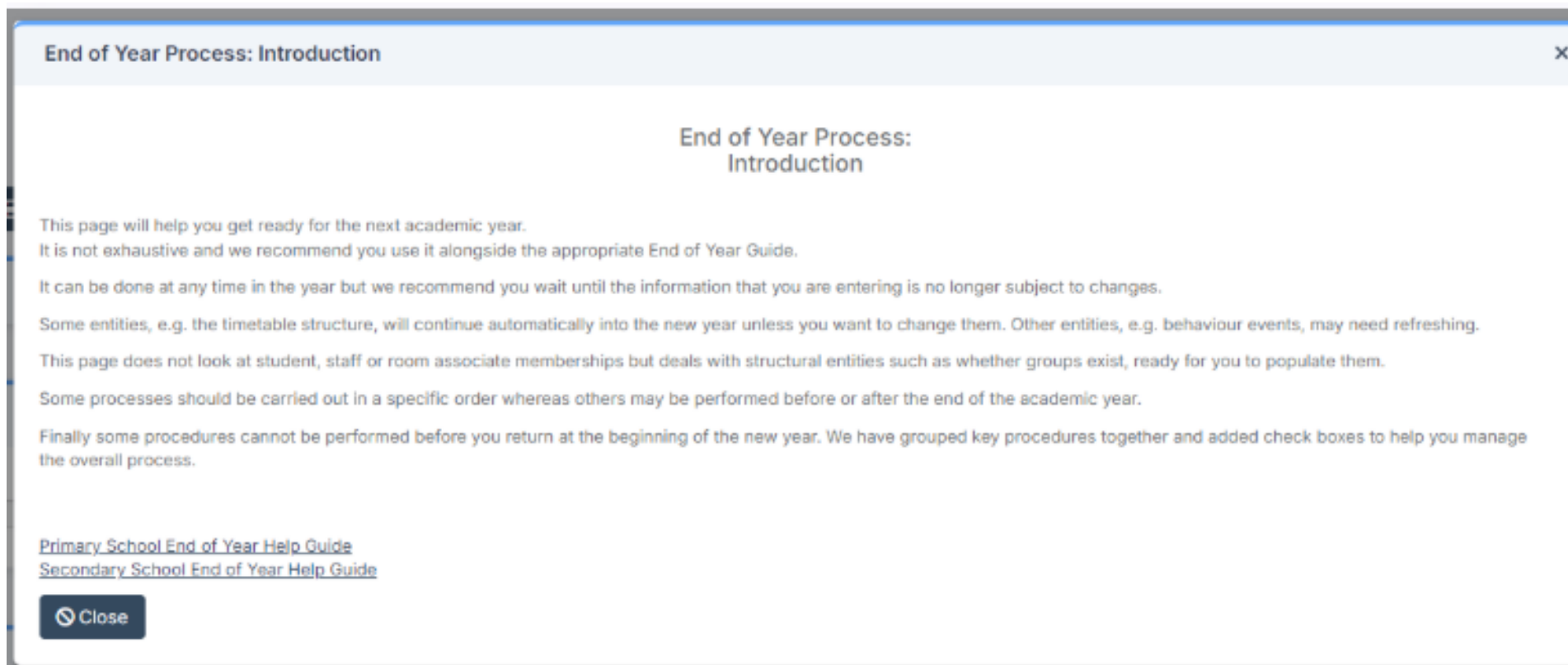
End of Year Dashboard

- Provides a checklist to help you track the progress of end of year tasks.
- Homepage > Dashboards > End of Year
- It doesn't include advisory or optional tasks, so you should use it alongside the [Bromcom End of Year process guide](#).



End of Year Dashboard (2)

- Introduction – displayed first time you access it



The screenshot shows a web browser window titled "End of Year Process: Introduction". The content is centered and reads:

**End of Year Process:
Introduction**

This page will help you get ready for the next academic year.
It is not exhaustive and we recommend you use it alongside the appropriate End of Year Guide.

It can be done at any time in the year but we recommend you wait until the information that you are entering is no longer subject to changes.

Some entities, e.g. the timetable structure, will continue automatically into the new year unless you want to change them. Other entities, e.g. behaviour events, may need refreshing.

This page does not look at student, staff or room associate memberships but deals with structural entities such as whether groups exist, ready for you to populate them.

Some processes should be carried out in a specific order whereas others may be performed before or after the end of the academic year.

Finally some procedures cannot be performed before you return at the beginning of the new year. We have grouped key procedures together and added check boxes to help you manage the overall process.

[Primary School End of Year Help Guide](#)
[Secondary School End of Year Help Guide](#)

Close

End of Year Dashboard (2)

Bromcom Primary School Primary

Search

End of Year

End of Year

Refresh Health Check Print Checklist

How to use this checklist

Progress

Category	Progress
Ending This Year	50%
Setting Up Next Year	75%
Key Tasks	14%

Ending This Year

Need Help

EOY Dashboard configuration

- There are 2 areas which need to be configured:

1. Config > Setup > Roles & Permissions

- Select the relevant role and select the Profile module, ensure there is a tick in the End of Year Checklist box

2. Config > Administration > Administration Defaults

- Ensure there is a tick in the Display EOY Checklist box

Save Cancel History

Edit Role: DemoAdmin

Role Name* DemoAdmin Role Description DemoAdmin Role Rank 99

Please set the permissions of this role

Module Profile

Menu Name	Access	New	Edit	Delete	Save
Students On Report	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Behaviour Referral Summary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My Homework Tasks	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff Absence Thresholds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dashboard Administration	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Administration	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attendance Dashboard	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Behaviour Dashboard	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safeguarding Dashboard	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
End Of Year Checklist	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Contact selection auto complete detail First address line with postcode

Absence Code is Personal

Show all Staff Contracts by default

Show emergency contacts based on contact priority

Display End of Year Checklist

Show Access Arrangements based on Application Date

Stop users making staff leaver if there are active timetables after leaving date

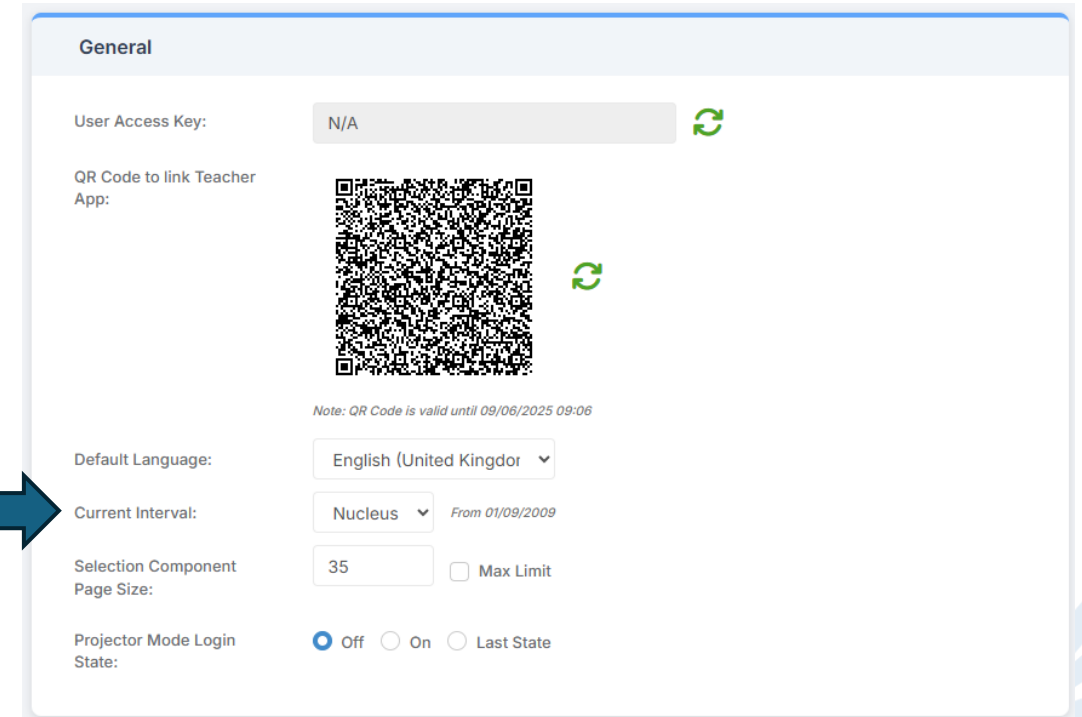
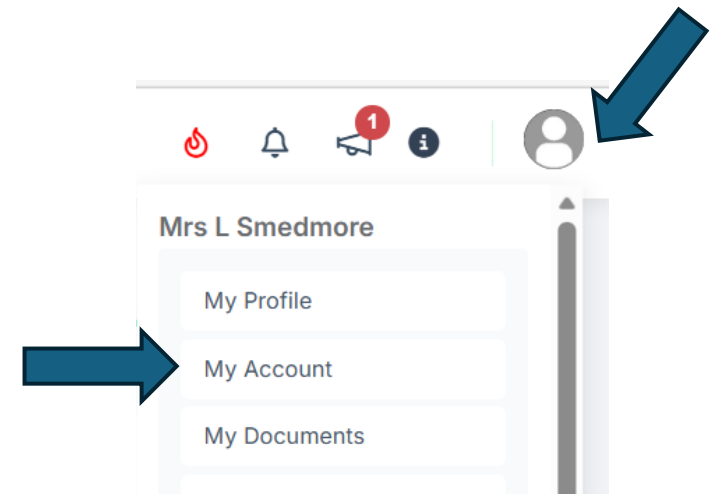
Base Attendance Figures in Student Overview tab AM/PM Class

Creating the new Academic Year

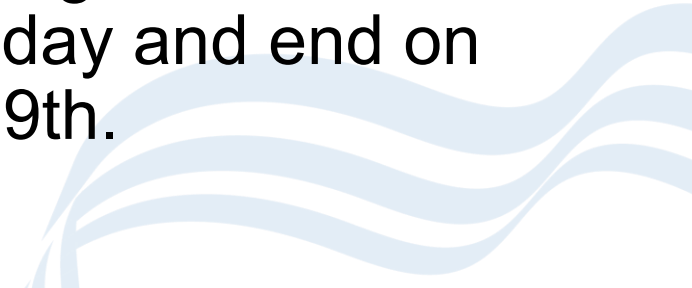


Interval Setting

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



New Academic Year

- **Config > Curriculum > Academic Years**
 - Select the Current Academic Year - 2025/26 and check the end date.
 - **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 – you mustn't have any gaps.**
 - **It is not possible to change the start date once the academic year has been created so this is a very important step.**
 - 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 29th.
- 

Coventry Term Dates

Autumn term

- Starts: Tuesday, 1 September 2026
- Ends: Friday, 18 December 2026

October Half Term Holiday

Monday 26 October 2026 to Friday 30 October 2026

Spring term

- Starts: Monday, 4 January 2027
- Ends: Thursday, 25 March 2027

February Half Term Holiday

Monday 15 February 2027 to Friday 19 February 2027

Easter Holiday

Monday 30 March 2026 to Friday 10 April 2026

Summer term

- Starts: Monday, 12 April 2027
- Ends: Wednesday, 21 July 2027

May Day Bank Holiday Monday 3 May 2027

Half Term Holiday

Monday 31 May 2027 to Friday 4 June 2027

Summer Holidays begin

- Starts: Thursday, 22 July 2027
- Ends: Tuesday, 31 August 2027


2027/28 Academic Year

Starts Wednesday 1 September 2027



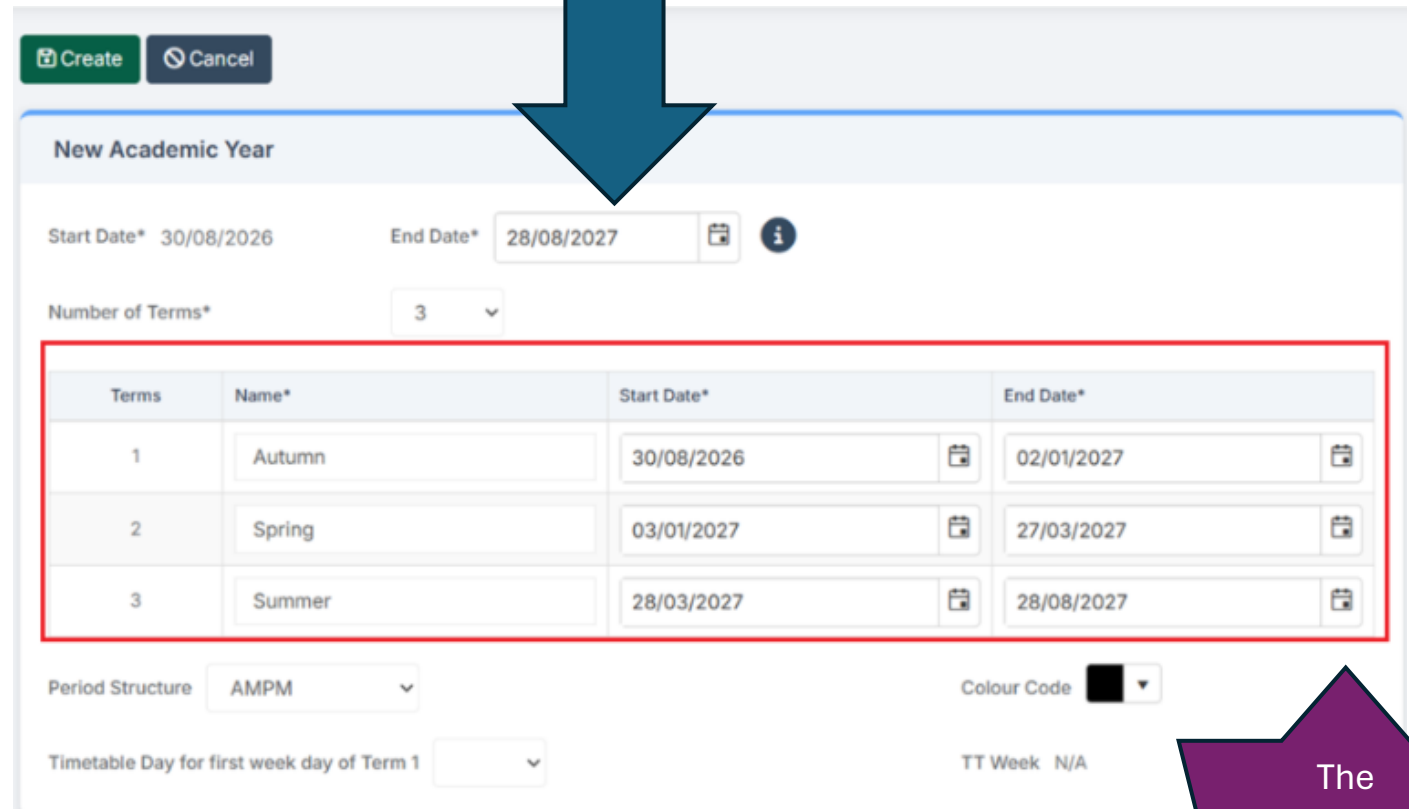
Create your new academic year

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 2026/27 doesn't already exist
 3. If it doesn't, click **New**
- 

Create new academic year (continued)

- End Date is the last Saturday of August e.g. 28/08/2027
- Start date is always a Sunday
- You can change the name of the terms
- Enter the term dates
 - Don't leave any gaps at all. Holidays are added in a later step
- Assign a Period Structure – probably the one used in the current year
- Click **Create** when done



The screenshot shows a web form titled "New Academic Year". At the top left are "Create" and "Cancel" buttons. The form fields are: "Start Date*" (30/08/2026), "End Date*" (28/08/2027), and "Number of Terms*" (3). Below these is a table with three rows for terms. The table is highlighted with a red border. At the bottom of the form are "Period Structure" (AMPM), "Colour Code" (black), "Timetable Day for first week day of Term 1", and "TT Week" (N/A).

Terms	Name*	Start Date*	End Date*
1	Autumn	30/08/2026	02/01/2027
2	Spring	03/01/2027	27/03/2027
3	Summer	28/03/2027	28/08/2027

The process may take a while

Academic Year Setup : Enter Holidays and Inset Days

Config > Curriculum > Academic Days

1. Choose the academic year from the drop down
 2. Expand each term panel and add all closures
 3. Click the Edit button next to the week in which you want to add a closure
 4. Enter the correct code for the specific day of the week, e.g. \$ for inset day or # for holiday
 5. Make sure “–” is entered for each day school is open
- Staggered Start (e.g. Reception):
 - Modules > Attendance > Bulk Attendance Update
 - Update children who are starting later with the relevant attendance code – do this in September

Week 1, Autumn 26/27

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

Day	Date	AM	PM	TT Day	Lock
Sun	30/08/2026	* ▾	* ▾	- ▾	<input type="checkbox"/>
Mon	31/08/2026	# ▾	# ▾	- ▾	<input type="checkbox"/>
Tue	01/09/2026	\$ ▾	\$ ▾	- ▾	<input type="checkbox"/>
Wed	02/09/2026	\$ ▾	\$ ▾	- ▾	<input type="checkbox"/>
Thu	03/09/2026	- ▾	- ▾	4 ▾	<input type="checkbox"/>
Fri	04/09/2026	- ▾	- ▾	5 ▾	<input type="checkbox"/>
Sat	05/09/2026	* ▾	* ▾	- ▾	<input type="checkbox"/>

Cascade Timetable on Save

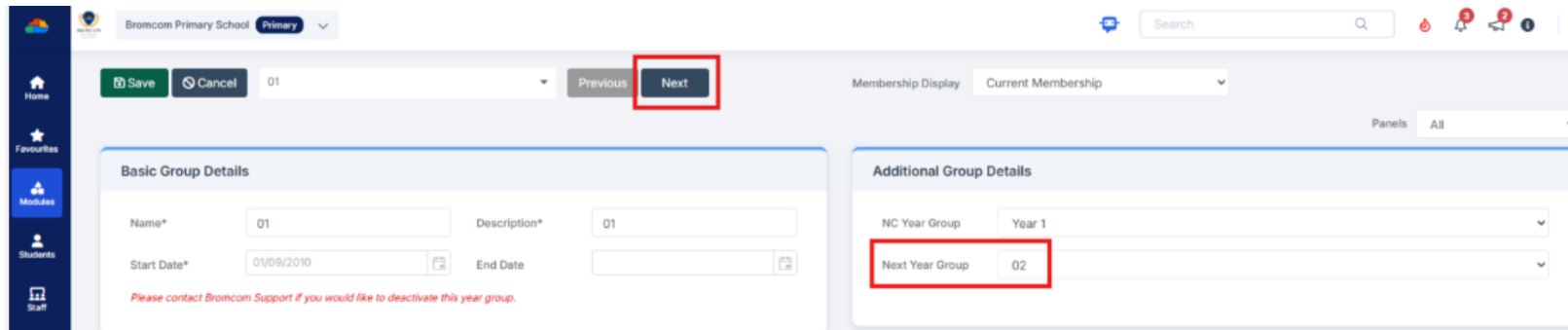
Cascade changes only within this term Cascade changes in this term and all subsequent terms

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

Skip Non-Academic Weeks

Promoting Year Groups: Checks

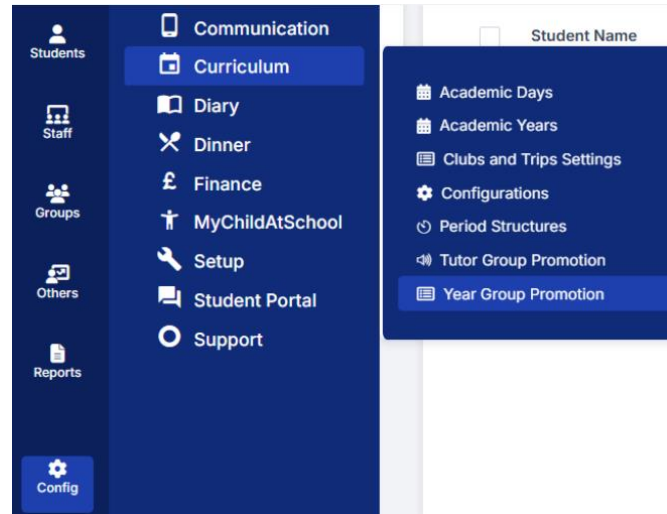
- Before you start, you must ensure that;
 - Year Groups **do not** have **end dates** (if they do, remove them)
 - Each year group has a **next year group** assigned
- Navigate to **Groups > Group Type = Year Group**
- **Select All** year groups and **View**
- Ensure that the **Additional Group Details** panel displays where the group will promote to in the **Next Year Group** drop down.
- Use the **Next** button to review each year group in turn
- Note: Year 6 will promote to Year 6




The screenshot shows the Bromcom Primary School system interface. The top navigation bar includes a search bar and several notification icons. Below the navigation bar, there are buttons for 'Save' and 'Cancel', and a dropdown menu showing '01'. A 'Previous' button and a 'Next' button are visible, with the 'Next' button highlighted by a red box. The main content area is divided into two panels: 'Basic Group Details' and 'Additional Group Details'. The 'Basic Group Details' panel shows fields for 'Name*' (01), 'Description*' (01), 'Start Date*' (01/09/2010), and 'End Date'. The 'Additional Group Details' panel shows a dropdown for 'NC Year Group' (Year 1) and a dropdown for 'Next Year Group' (02), with the 'Next Year Group' dropdown highlighted by a red box. A footer note reads: 'Please contact Bromcom Support if you would like to deactivate this year group.'

Promoting Year Groups

- When you have finished your checks, go to **Config > Curriculum > Year Group Promotion**
- Begin by **reviewing the academic year** from which **memberships** are to be **taken from**.

A screenshot of the 'Year Group Promotion' configuration screen. The title 'Year Group Promotion' is at the top. Below it, the text reads: 'Select the Academic year from which you want to promote the Year group memberships'. A dropdown menu is open, showing 'Promote from' and '25/26'. Below the dropdown is a button that says 'Add to any existing memberships'. Further down, the text says 'By Default this will promote all the students'. There are two checkboxes: 'Create bands matching those in the current year, including memberships' and 'Include staff memberships e.g. Head of Years'. At the bottom, there is a date field 'Active On' with the value '28/04/2026' and an information icon.

Promoting Year Groups (2)

- There are two options available in the next drop-down menu:
 - **Add to any existing Memberships** - preserves any memberships already added to the Year Group for the following year (e.g. new students manually added with a future start date in September).
 - **Overwrite all existing memberships** - removes any existing memberships in the Year Group for the following year and replaces them with the promoted cohort.
- 


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 from which Year Group memberships are taken and promoted.
 - **It is CRUCIAL that this is set to a Date in the CURRENT Academic Year before September, while students are still in their CURRENT Year Groups.**
 - This ensures the system uses **current student memberships** and promotes students into the correct Year Groups for 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.
- Confirmation pop-up “Year Group Promotion saved successfully”

✓ OK

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  

Tutor Group Promotion

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.

Mixed/Vertical Tutor Group

- **Do not use Tutor Group promotion** for Mixed/Vertical Tutor Groups
- **Do not End Date** the group

Google/Office 365 Integration

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




End-Dating Tutor Groups

- If you have attended Bromcom training this year they have changed their advice to schools and are now recommending that you **end date all tutor groups**.
- This change has been made to make the training more straightforward as this area can cause confusion for users.
- It is not due to any changes in the system, and we would not necessarily recommend that you end date all tutor groups (see previous slide).
- If your tutor group names are changing in the next academic year you must end date your tutor groups.

Groups > Group Type – Tutor Groups

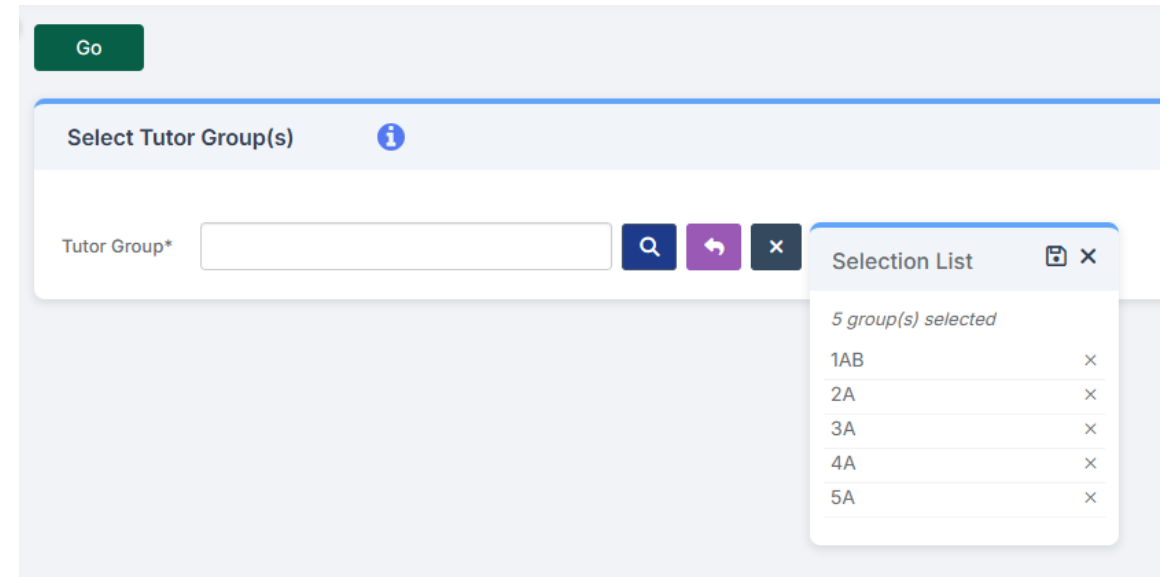
- **Add** the **End Date** column to check whether these are already entered
- **Select all** the Tutor groups – **View** – **Enter End Date** – **Save** - Use **Next / Previous** button to move through and update all
- Alternatively, you can use the **Bulk Edit** feature on the **Actions** menu

End-Dating Tutor Groups (2)

- If your current 25/26 Tutor Groups are ending, and you are not going to continue using the SAME Tutor Group names 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 also need to **create the new tutor groups.**
- 

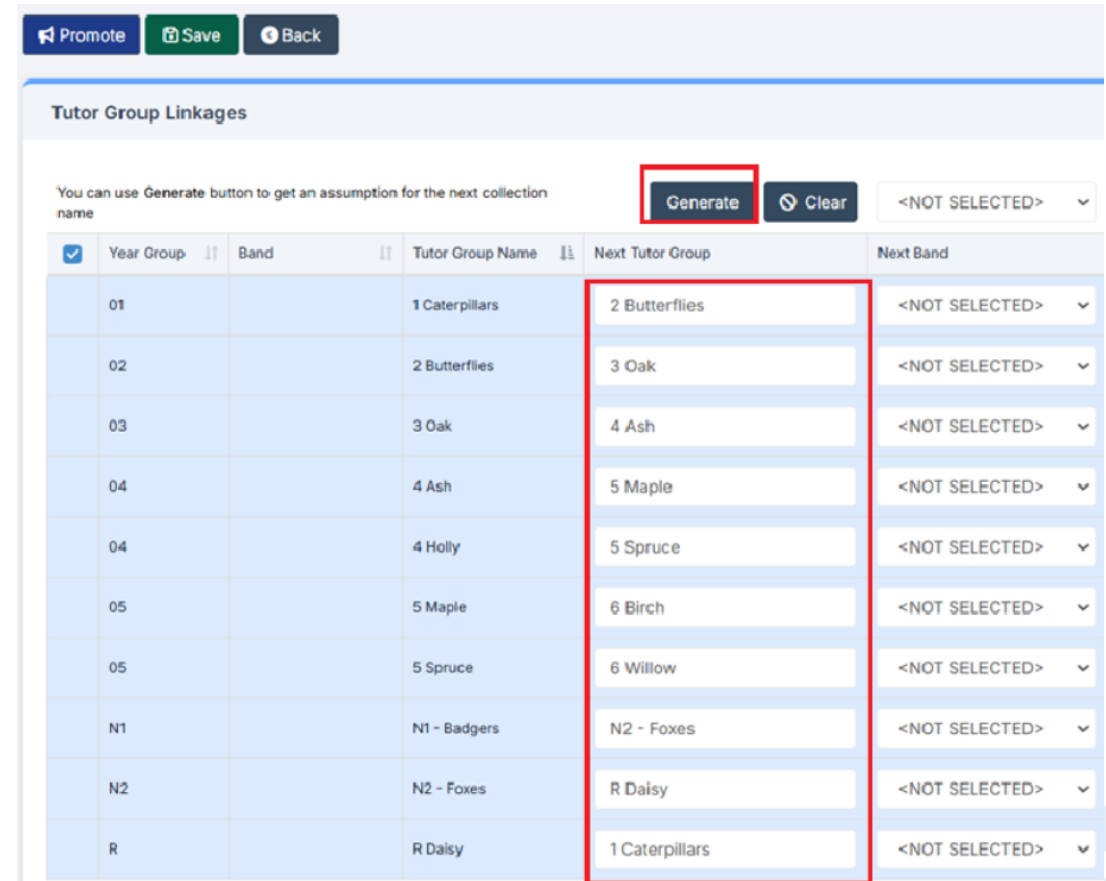
Tutor Group Promotion Wizard (1)

- This process will create brand new tutor groups
- **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



Tutor Group Promotion Wizard (2)

- In the **Tutor Group Linkages** panel, select the existing tutor groups (they will highlight in blue), then either click **Generate** to allow the system to suggest a new tutor group name, or **manually enter** the required name in the **Next Tutor Group** column.
- 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 or you have already created new tutor groups, please ensure that the names added into the next tutor group field match exactly.**



The screenshot shows the 'Tutor Group Linkages' interface. At the top, there are buttons for 'Promote', 'Save', and 'Back'. Below this, the title 'Tutor Group Linkages' is displayed. A note states: 'You can use Generate button to get an assumption for the next collection name'. To the right of this note are 'Generate' and 'Clear' buttons, and a dropdown menu set to '<NOT SELECTED>'. The main part of the interface is a table with the following columns: 'Year Group', 'Band', 'Tutor Group Name', 'Next Tutor Group', and 'Next Band'. The table contains 13 rows of data. The 'Next Tutor Group' column is highlighted with a red box, and the 'Generate' button is also highlighted with a red box.

<input checked="" type="checkbox"/>	Year Group	Band	Tutor Group Name	Next Tutor Group	Next Band
	01		1 Caterpillars	2 Butterflies	<NOT SELECTED>
	02		2 Butterflies	3 Oak	<NOT SELECTED>
	03		3 Oak	4 Ash	<NOT SELECTED>
	04		4 Ash	5 Maple	<NOT SELECTED>
	04		4 Holly	5 Spruce	<NOT SELECTED>
	05		5 Maple	6 Birch	<NOT SELECTED>
	05		5 Spruce	6 Willow	<NOT SELECTED>
	N1		N1 - Badgers	N2 - Foxes	<NOT SELECTED>
	N2		N2 - Foxes	R Daisy	<NOT SELECTED>
	R		R Daisy	1 Caterpillars	<NOT SELECTED>

Tutor Group Promotion Wizard (3)

- Click **Save** to retain the setup and return later or
- **Promote** to continue
- Select the **academic year to promote into** (this will default to the new academic year) and review the pre-populated **Start** and **End Dates**
- You can choose to exclude any of the Groups by deleting them from the list using the Red Delete button

Go Reset

Tutor Group Promotion

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

Promote To: 26/27











Start Date*: 30/08/2026 End Date: 28/08/2027

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 in use.


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		1 Caterpillars	2 Butterflies	
	02		2 Butterflies	3 Oak	
	03		3 Oak	4 Ash	
	04		4 Ash	5 Maple	
	04		4 Holly	5 Spruce	
	05		5 Maple	6 Birch	
	05		5 Spruce	6 Willow	
	N1		N1 - Badgers	N2 - Foxes	
	N2		N2 - Foxes	R Daisy	
	R		R Daisy	1 Caterpillars	

Tutor Group Promotion Wizard (4)

- As with Year Groups, memberships can be managed using either **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.
- 

Merging Tutor Groups

- If you plan to merge two Tutor Groups (e.g. 1A and 1B into 2AB), 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.
- [How to approach Year Group and Tutor Group Promotion – Bromcom – Documentation Centre](#)



Manually Creating Tutor Groups

- Tutor Groups for the new academic year can also be created manually via **Groups > Group Type = Tutor Group**
- Click **New**
- Enter a **Name, Description, Default Room, Main Tutor, Year Group, Start Date, Registration details**
- Click **Save**

Create New Group

Group to create: Tutor Group

Name* R Rose Description* Reception Rose

Main Tutor* Andrews, Chri... x Default Room* 10 x


Year Group* R

Start Date* 30/08/2026 End Date

Registration occurs in AM/PM sessions
 Registration is scheduled in timetable
 No timetable

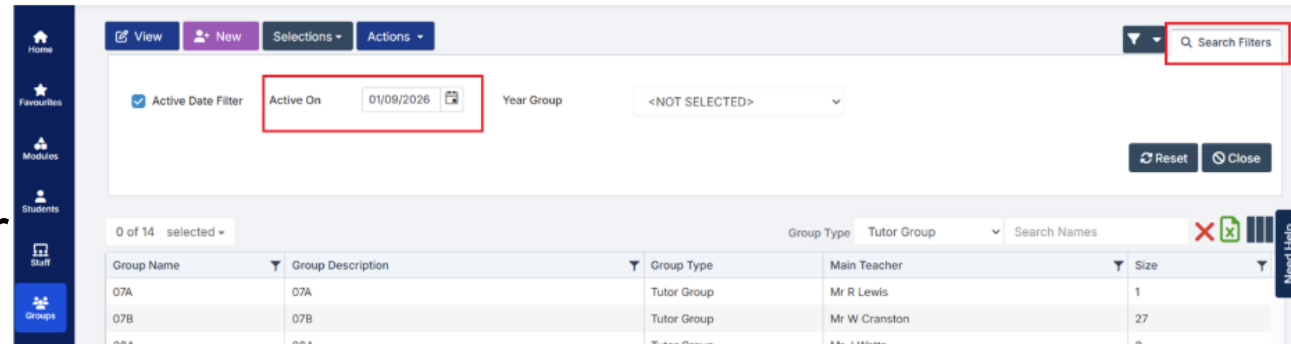
Save Save & Edit Cancel

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 > Tutor Group > Select Tutor Group > View.**
 - Open each tutor group in turn and make your changes – repeat these steps for each group.
 - Go to the **Associated Staff Panel**
 - To replace a member of staff, start by **end-dating** the current staff record
 - If required, untick **Tracks group end date** to display the **End Date** field. Enter the relevant date, then click the **tick** icon to save the record
 - To add a new member of staff click **Add New Record**
 - Choose the member of staff and then click the tick to save the record
- 

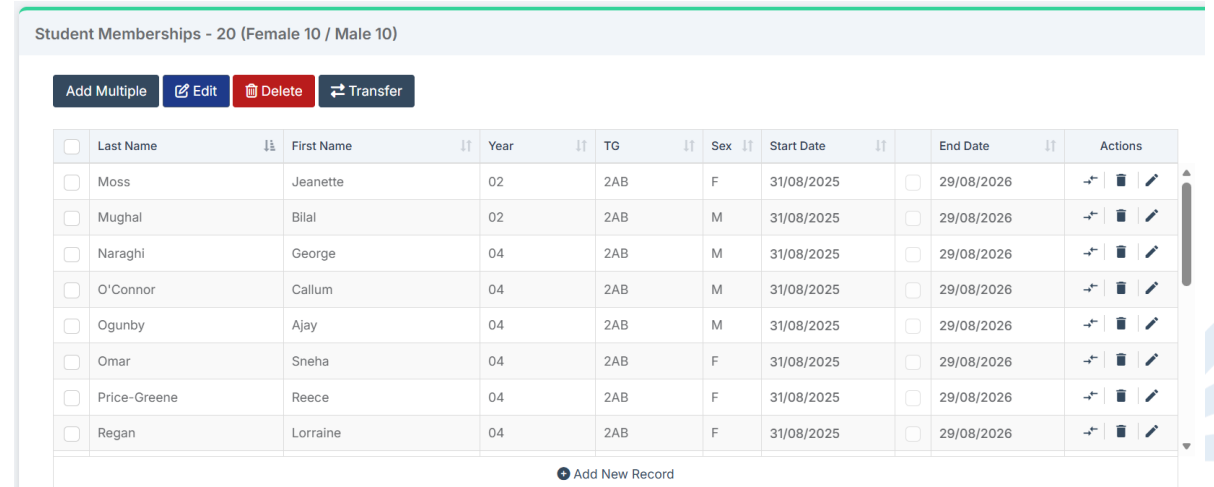
Manually Adding and Transferring Student Memberships

- New intake cohort e.g. Reception
- Mixed / Vertical tutor groups
- Changing lots of children to different tutor groups within a year group
- **Groups > Group Type = Tutor Groups**
- Click **Search Filters** and change the **Active On** date to a date in the new academic year
- Tutor groups created for the new academic year will now display
- Double click or **View** the required Tutor Group



The screenshot shows the 'Search Filters' section of the system interface. The 'Active On' date is set to 01/09/2026, and the 'Year Group' is set to '<NOT SELECTED>'. The 'Search Filters' button is highlighted with a red box. Below the filters, there is a table with columns: Group Name, Group Description, Group Type, Main Teacher, and Size. The table contains three rows of data.

Group Name	Group Description	Group Type	Main Teacher	Size
07A	07A	Tutor Group	Mr R Lewis	1
07B	07B	Tutor Group	Mr W Cranston	27
07A	07A	Tutor Group	Mr J White	0



The screenshot shows the 'Student Memberships' table. The table is titled 'Student Memberships - 20 (Female 10 / Male 10)'. The table has columns: Last Name, First Name, Year, TG, Sex, Start Date, End Date, and Actions. The table contains 10 rows of data. Below the table, there is a button 'Add New Record'.

	Last Name	First Name	Year	TG	Sex	Start Date	End Date	Actions
<input type="checkbox"/>	Moss	Jeanette	02	2AB	F	31/08/2025	29/08/2026	-+ 🗑️ ✎
<input type="checkbox"/>	Mughal	Bilal	02	2AB	M	31/08/2025	29/08/2026	-+ 🗑️ ✎
<input type="checkbox"/>	Naraghi	George	04	2AB	M	31/08/2025	29/08/2026	-+ 🗑️ ✎
<input type="checkbox"/>	O'Connor	Callum	04	2AB	M	31/08/2025	29/08/2026	-+ 🗑️ ✎
<input type="checkbox"/>	Ogunby	Ajay	04	2AB	M	31/08/2025	29/08/2026	-+ 🗑️ ✎
<input type="checkbox"/>	Omar	Sneha	04	2AB	F	31/08/2025	29/08/2026	-+ 🗑️ ✎
<input type="checkbox"/>	Price-Greene	Reece	04	2AB	F	31/08/2025	29/08/2026	-+ 🗑️ ✎
<input type="checkbox"/>	Regan	Lorraine	04	2AB	F	31/08/2025	29/08/2026	-+ 🗑️ ✎

Manually Adding Students to a Tutor Group

The screenshot shows the 'Student Selector' window. On the left, there are search filters for Last Name, First Name, Class/Group, Year Group, Status (set to 'Pre Admission'), and Date of Birth. The main area displays a table of 14 results, with 6 items selected. The table columns are Last Name, First Name, Admission Number, Year Group, and Tutor Group. A red box highlights the 'Done' button in the top right of the table area.

Last Name	First Name	Admission Number	Year Group	Tutor Group
Ackles	Jensen	PreAdm-000015		
Adams	Wednesday	PreAdm-000019		
Addison	Sara	PreAdm-000011		
Biggs	Scott	PreAdm-00010		
Canfield	Sophie	PreAdm-000020		
Grey	Meredith	PreAdm-000012		
Hartley	Justin	PreAdm-000016		
Jones	David	PreAdm-0000008		
Karev	Alexander	PreAdm-000014		
Shepherd	Amelia	PreAdm-000018		

- Navigate to the **Student Memberships** panel
- Click **Add Multiple** to add students to the group
- Click the **blue magnifying glass** to open the **Student Selector**
- Select the required students then click Done.
- For example: to add your Reception intake to a tutor group, locate pre-admission students by selecting **Pre Admission** from the **Status** dropdown, then click **Find** to refresh the student list. Select the required students then click **Done** (see screenshot)
- Enter the **Start Date** for the student memberships, then click **Save**

Transferring Student Memberships

- It may be necessary to **transfer student memberships** from one tutor group to another.
- This can also be done within the **Student Memberships** panel.
- To **transfer multiple** students, select the required records and click **Transfer**.
- To **transfer a single** student, select the **transfer arrow** in the **Actions** column on the right-hand side of the panel.
- Select the required group from the **Group Name** drop-down. Check that the **start date** is correct, then click **Save**.

Student Memberships - 6 (Female 4 / Male 2)

Add Multiple Edit Delete Transfer

<input type="checkbox"/>	Last Name	First Name	Year	TG	Sex	Start Date	End Date	Actions
<input checked="" type="checkbox"/>	Ackles	Jensen		R Rose	M	30/08/2026	Tracks group end date	- [] []
<input checked="" type="checkbox"/>	Adams	Wednesday		R Rose	F	30/08/2026	Tracks group end date	- [] []
<input checked="" type="checkbox"/>	Addison	Sara		R Rose	F	30/08/2026	Tracks group end date	- [] []
<input type="checkbox"/>	Biggs	Scott		R Rose	M	30/08/2026	Tracks group end date	- [] []
<input type="checkbox"/>	Canfield	Sophie		R Rose	F	30/08/2026	Tracks group end date	- [] []
<input type="checkbox"/>	Grey	Meredith		R Rose	F	30/08/2026	Tracks group end date	- [] []

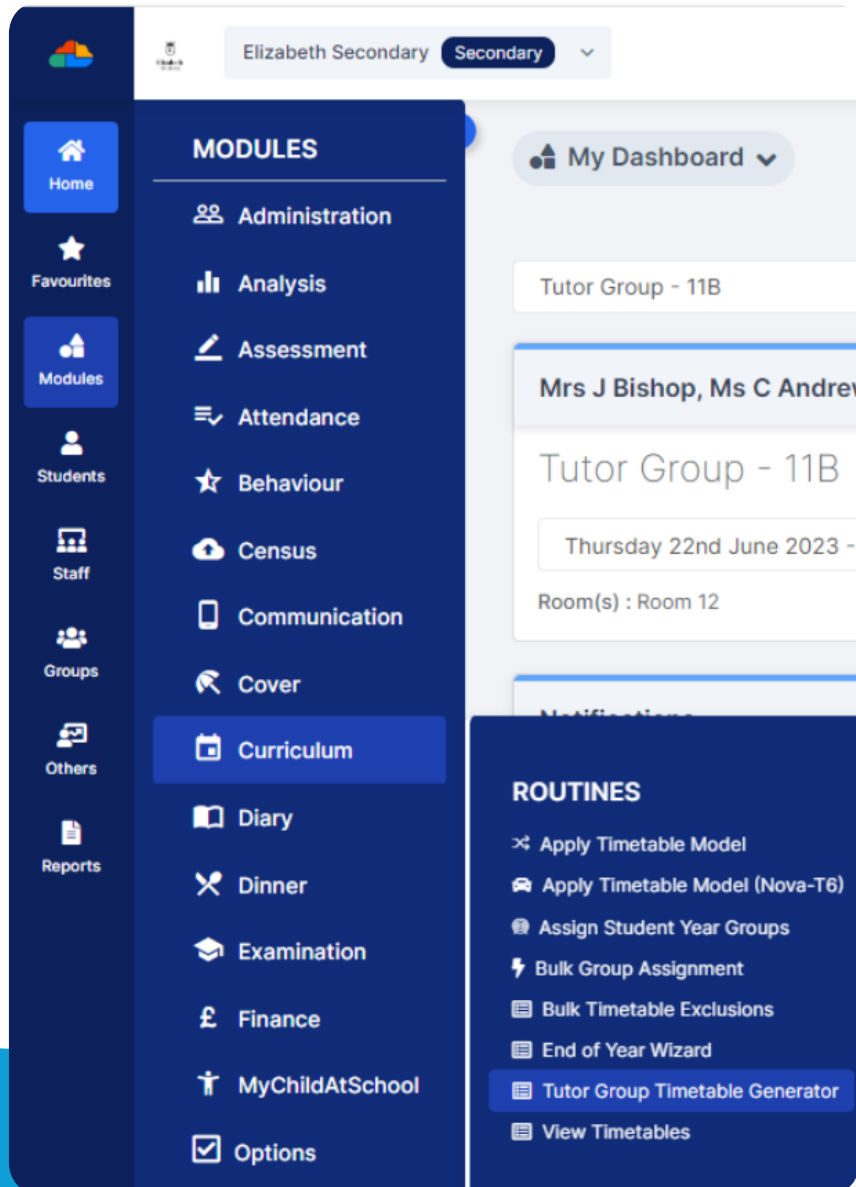
Add New Record

Student Memberships - 6 (Female 4 / Male 2)

Add Multiple Edit Delete Transfer

<input type="checkbox"/>	Last Name	First Name	Year	TG	Sex	Start Date	End Date	Actions
<input checked="" type="checkbox"/>	Ackles	Jensen		R Rose	M	30/08/2026	Tracks group end date	- [] []
<input type="checkbox"/>	Adams	Wednesday		R Rose	F	30/08/2026	Tracks group end date	- [] []
<input type="checkbox"/>	Addison	Sara		R Rose	F	30/08/2026	Tracks group end date	- [] []
<input type="checkbox"/>	Biggs	Scott		R Rose	M	30/08/2026	Tracks group end date	- [] []
<input type="checkbox"/>	Canfield	Sophie		R Rose	F	30/08/2026	Tracks group end date	- [] []
<input type="checkbox"/>	Grey	Meredith		R Rose	F	30/08/2026	Tracks group end date	- [] []

Add New Record



Registers

- Once all tutor groups have been created and the correct staff and rooms are assigned, tutor group **timetables** must be set up to **generate registers**.
- This can be completed in one of two ways, depending on whether the tutor group is led by a **single teacher** or shared by **multiple teachers**.

Registers – Single Teacher Tutor Groups

Apply

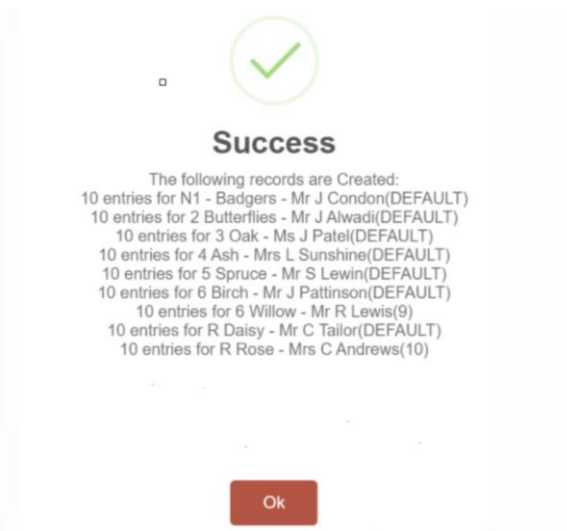
Tutor Group Timetable Generator

Select a date range and tutor group(s) to generate the timetable

Start Date: 30/08/2026 End Date: 28/08/2027

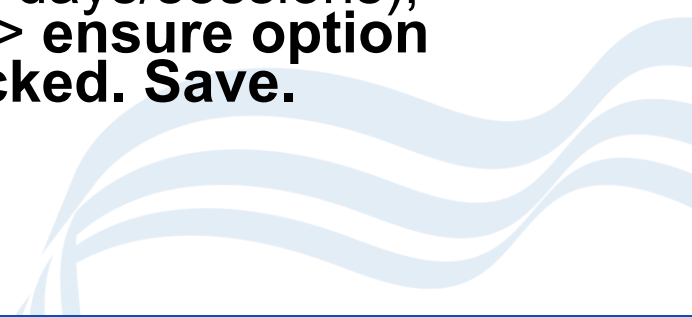
Select Tutor Group

- 1 Caterpillars ✕
- 2 Butterflies ✕
- 3 Oak ✕
- 4 Ash ✕
- 4 Holly ✕
- 5 Maple ✕
- 5 Spruce ✕
- 6 Birch ✕
- 6 Willow ✕
- N1 - Badgers ✕
- N2 - Foxes ✕
- R Daisy ✕
- R Rose ✕



- **Modules > Curriculum > Tutor Group Timetable Generator**
- Select the **Start** and **End Dates** that you want the timetable to run for (e.g. the Academic Year) then choose the relevant **tutor groups**.
- Then click **Apply**
- A confirmation message will display
- This process should also run automatically overnight provided your system is configured correctly:
 - **Config > Setup > Daily Maintenance > Settings > ensure option 10 Create / Update / Delete Tutor Group Timetables is ticked.**

Registers - Shared Tutor Groups

- **Groups > select Group Type = Tutor Group**
 - Start by ensuring that the required staff and room are added in **Associated Staff** and **Room** panels
 - Scroll down to the **Associated Timetable** panel and click **Add Multiple**
 - Select the first member of staff, then the room, and click **Add Multiple Periods**
 - Enter the **Start** and **End Dates** for the academic year, then select the **days/sessions** the member of staff teaches the class. **Save.**
 - Repeat this process for the second member of staff and any remaining days/sessions and then Save.
 - To prevent the system from automatically updating the tutor group overnight (which will result in both members of staff being assigned to all days/sessions), navigate to **Config > Setup > Daily Maintenance > Settings > ensure option 10 Create/Update/Delete Tutor Group Timetables is NOT ticked. Save.**
- 

Registers – Combination

- If you have a combination whereby you have some Tutor Groups with one tutor and some with more than one:
 - Use **Modules > Curriculum > Timetable Generator** – to create the timetables for the Single Teacher Tutor Groups only
 - Use **Groups > Tutor Group** and the **Associated Timetable** panel (as in the previous slide) to create the timetables of the Tutor Groups with more than one teacher.
- TIP: Save/Print blank registers for September



Admissions



Adding New Pupils

There are three ways

1. **Manually Adding a Student via Student List > New**

Important: It is advisable to check that students have not already been added to avoid creating duplicate records. For Pre-Admission Students, click **Search Filters** at the top right, change **Status** to **Pre Admission**.

2. **Via Common Transfer File (CTF)** - if arriving from another school in England

3. **Via Admissions Transfer File (ATF)** – if new intake




Set Up Pre-Admission Groups

Modules > Administration > Pre-Admission Groups

- **Pre-Admission Groups** allow schools to organise incoming students before full admission, typically based on **date of birth range** and **planned admission date**.
- This helps manage the admissions process efficiently and ensures students are grouped correctly before being added to the MIS.
- Admissions is a complex module. This presentation can only go into limited detail, more information is available here
- <https://docs.bromcom.com/knowledge-base/2026-admissions-guide/>

ATFs (Admissions and Transfer File)

- ATFs are provided by the LA (Admissions portal) and can be used to populate your system with your new intake.
 1. Create a Pre-Admission Group (previous slide)
 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

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  →


Sibling Match

- When ticked the Student Siblings box is ticked, any students that meet three or more of the following criteria will be automatically matched as a potential sibling to the new student and users can decide whether to link the match when it comes to the import stage:
 - Home phone numbers that match
 - Parental addresses that match
 - Parental email addresses that match
 - Parental names that match
 - Sibling match
- 

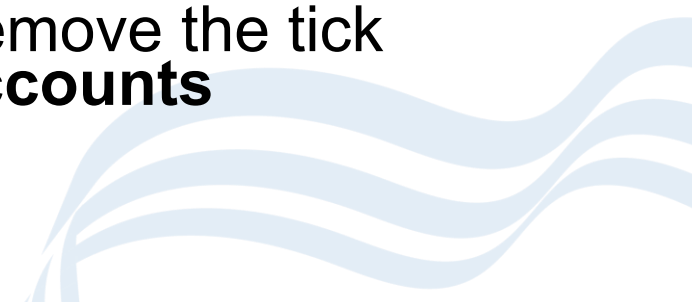
Notes About ATFs

- 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.
- 

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.
- 

Leavers

- To process leavers (individually or in bulk), navigate to **Student List**
 - Select the students that you want to make leavers.
 - **Actions > Process Leavers**
 - Review the list of leavers.
 - Enter a **Leaving Date, Reason, School** 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 have the option to create 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.
 - If leaving date is a future date you will probably want to remove the tick from **Remove parent/contact access from all MCAS accounts immediately.**
- 

Setting up MyChildAtSchool for next year



MCAS General Settings

Save

General Settings

Head Teacher Title:

Last Update Notification Threshold:

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

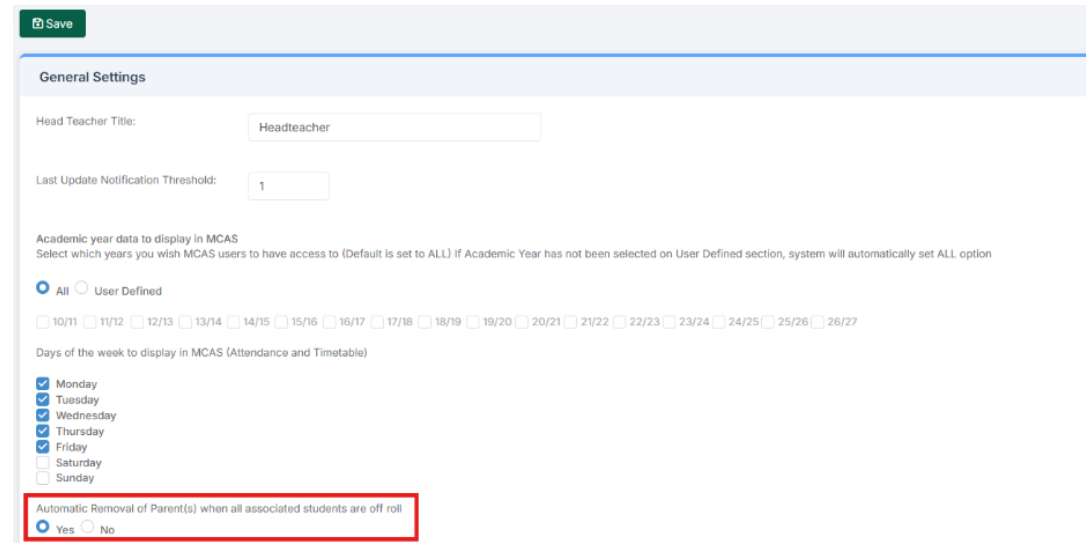
All User Defined

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 26/27

- To ensure the new academic year is visible to parents, navigate to **Config > MyChildAtSchool > General Settings**
- In the setting ‘Academic Year Data to Display in MCAS’ click to display the academic year 26/27 or ALL. You probably want to keep the academic year 25/26 ticked otherwise parents/careers won’t be able to view that data.
- When finished click **Save**

MCAS – Managing Leaver Accounts (1)

- Within **Config > MyChildAtSchool > General Settings**, ensure **Automatic Removal of Parent(s) when all associated students are off roll** is set to **Yes**. This will **disable** MCAS parent accounts once all associated students have been processed as leavers



Save

General Settings

Head Teacher Title:

Last Update Notification Threshold:

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 26/27

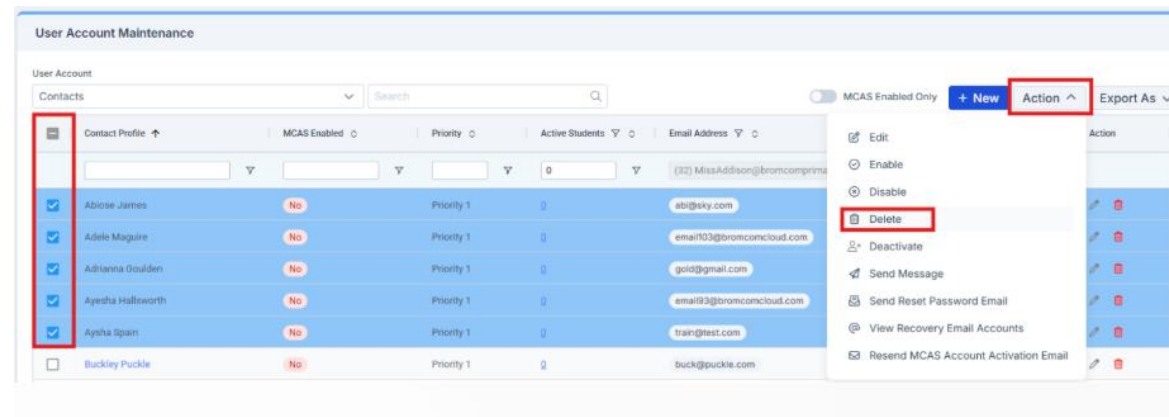
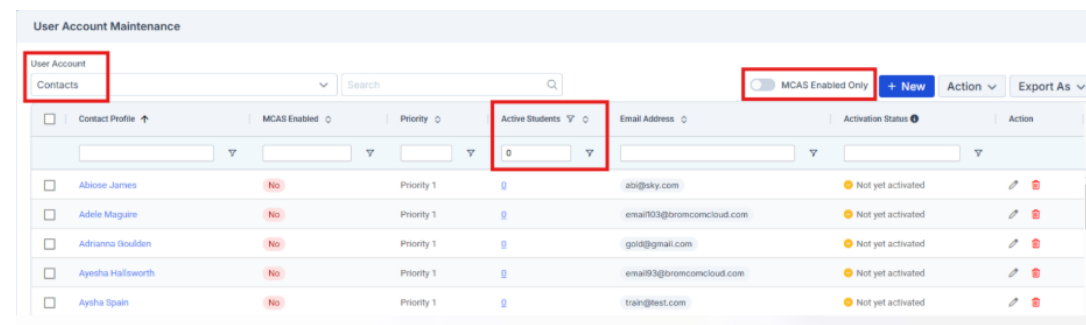
Days of the week to display in MCAS (Attendance and Timetable)

Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

Automatic Removal of Parent(s) when all associated students are off roll
 Yes No

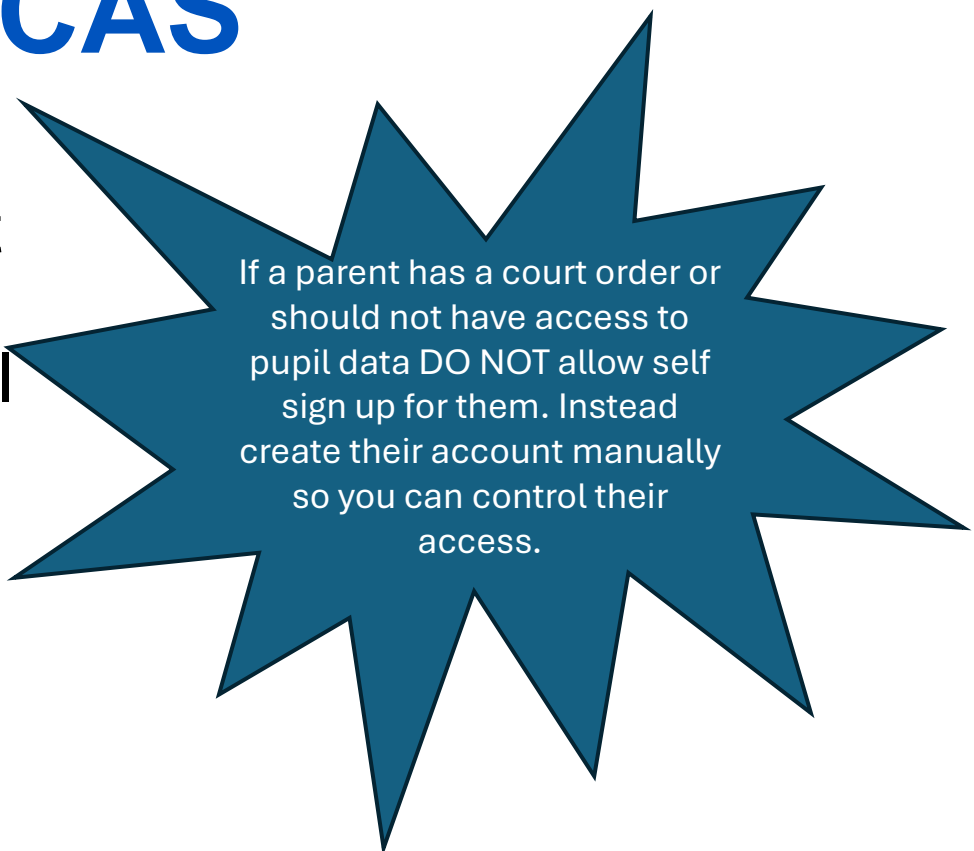
MCAS – Managing Leaver Accounts (2)

- To remove these disabled accounts, go to **Modules > MyChildAtSchool > User Accounts**
- Within the **User Account Maintenance** panel, select **Contacts** from the **User Account** drop-down menu and turn off the **MCAS Enabled Only** toggle to display **disabled** user accounts. Then use the **Active Students** column header to filter for accounts with **zero** active students.
- Review the list, **select** the required accounts, and choose **Delete** from the **Actions** menu



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 your contact register.
- Self sign up only works for parents/carers with parental responsibility
- From the MCAS General Settings Screen, click the **Enable Self-Up for Parents** check box.
- Click **Save** to save your changes



If a parent has a court order or should not have access to pupil data DO NOT allow self sign up for them. Instead create their account manually so you can control their access.

Enable Self Sign-Up for Parents



Important: MCAS Notifications

- When parents download the MCAS app make sure they “allow notifications” **at the time they install the app**. If they try to do it retrospectively it won’t work.
- If they need to do this retrospectively, they will need to uninstall and reinstall the app ensuring they allow notifications at install.



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**

Option to create Manually or Automatically:

- **Auto** radio button is ideal for creating new accounts in bulk and uses the criteria you then define below. You can also use this option to create an individual account.
- **Manual** radio button is ideal for creating individual accounts.

User Account Creation

Manual (Ideal for creating individual accounts)

Auto (Ideal for creating new accounts en masse, meeting the criteria set below)

Contact priority level and Parental Responsibility

Parental Responsibility (Note that any contacts with a Court Order will be ignored and need to be manually dealt with to set up an account)

Contact Priority All 1 2 3 4 10

Access	Contact Name	Student First Name	Student Last Name	Relation	Admission No	Tutor Group	Year Group	Priority	Parental Responsibility	Court Order Restriction	Show Stude Detail
<input checked="" type="checkbox"/>	Mrs L Addison	Harry	Addison	Mother	00832	4A	04	1	Yes	No	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Ms K Gaston	Olive	Gaston	Mother	N08383		05	1	Yes	No	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Ms C Addison	Peter	Addison	Mother	N2209	3B	04	1	Yes	No	<input checked="" type="checkbox"/>
	Mrs A										

Generate Accounts for Parents (2)

- Select the criteria e.g. Parental Responsibility, Contact Priority
- Check the list and make any changes required
- 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 MCAS Account Activation Email**.

User Account Creation Contacts without any email address are listed in red

Grid actions Copy Excel CSV PDF Print

Contact Name	Is Active	Students	Email Address
Mr R Malone	Enabled	Daniel Malone	
Mr S Heyes	Enabled	Heidi Heyes	
Mrs A Byrom	Enabled	Jade Byrom	
Mrs C Macleod	Enabled	Shelby Macleod	
Mrs L Chadwick	Enabled	Reece Chadwick	
Mrs L Hinchliffe	Enabled	Christopher Hinchliffe	
Mrs P Malone	Enabled	Daniel Malone	
Ms C Addison	Disabled	Sam Addison, David Addison, Harry Addison, Peter Addison, Sara Addison	testtest@example.com

Close Send MCAS Account Activation Email

Generating Accounts for Pre-Admissions

Modules > MyChildAtSchool > User accounts

- Create user accounts in the usual way
- Search “pre” to filter list to the Pre-Admissions


User Account Creation

Select Students Select Contacts


pre

<input type="checkbox"/>	Last Name <input type="text"/>	First Name <input type="text"/>	Tutor Group <input type="text"/>	Admission Number <input type="text"/>	Year Group <input type="text"/>
<input type="checkbox"/>	Barlow	Gary		PreAdm-000015	N/A

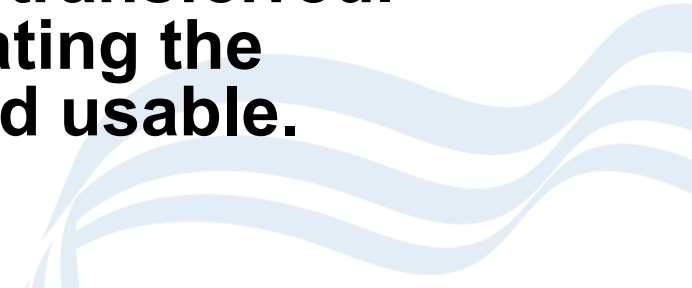
Clubs, Trips and Wraparound Care

- To create your clubs/trips for next year, firstly you must ensure that the new academic year has been created (closure dates and academic days can be changed later if not yet confirmed).
 - 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 create the trip.
- 

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. This would then require 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.**
- 

Dinner Money Balances

Dealing with outstanding Dinner Money / Wraparound balances for leavers



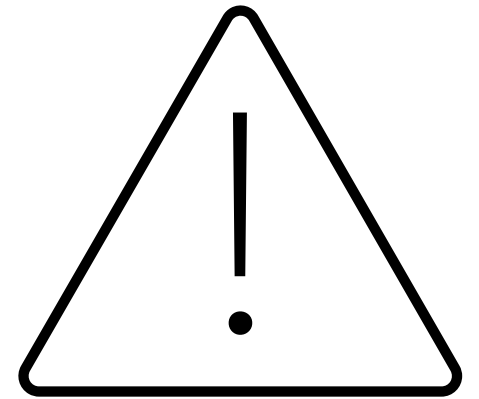
What are your options?

- For money owed to parents:
 - **Online refund to a payment card** (via MCAS)
 - 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.



MCAS – Outstanding Balances for Leavers

- To identify accounts that are in credit or debt, navigate to **Modules > MyChildAtSchool > View Balances**
- Use the **Year Groups** filter to refine the list to Year 6 students, then sort the **Total** column to bring accounts in credit to the top (sort again to see the accounts in debt).
- Credit balances can be either:
 - **Transferred** to a sibling account using the **Transfer** button in the top-left corner.
 - **Refunded** via **Modules > MyChildAtSchool > View Orders**

Documents available

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

Updating Behaviour

Only relevant to schools who are using the behaviour module



Updating behaviour

- If your school is using Behaviour you may need to review and update your setup 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.
- [Primary End of Year Processes Guide 2026 – Behaviour Pathways](#)

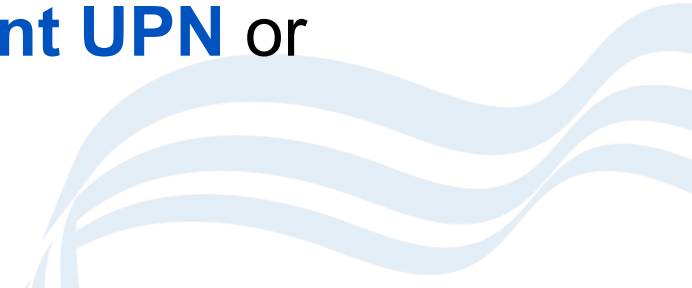


Reporting Home to Parents

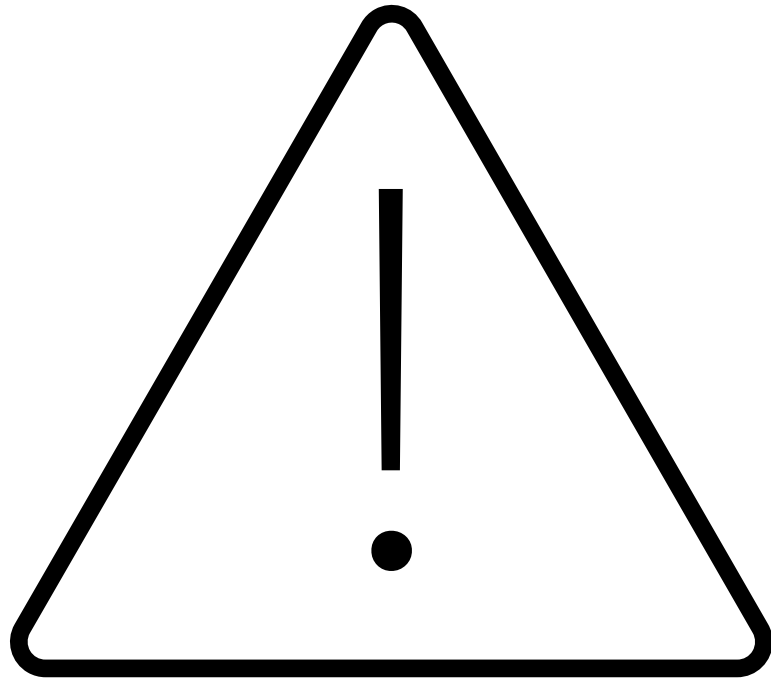
How to upload reports and other documents for parents.



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

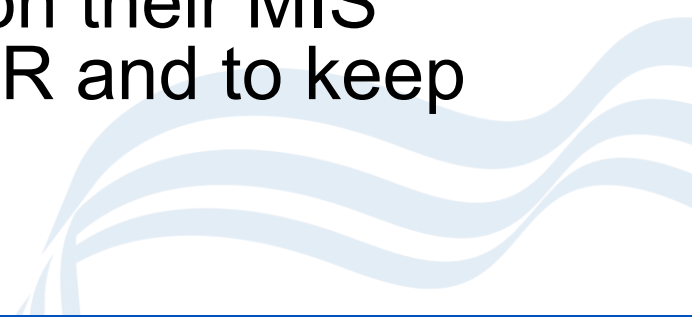


- Files will be matched on the **UPN** or **admission number** in the file name to a pupil in Bromcom.
- **If** a file contains **an incorrect number**, then it might be matched to the wrong child, which could lead to **a data breach**.
- **Double check** your file names before you start.

Document Types and Sizes

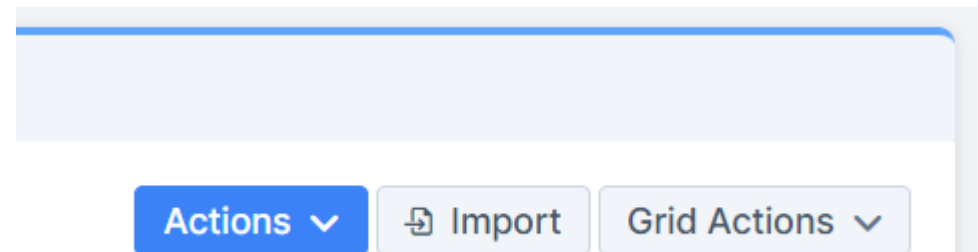
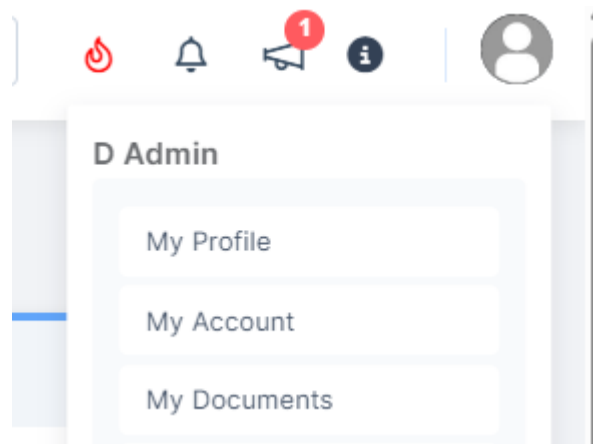
1. The supported file types are:
 - .pdf, .doc, .docx, .xls, .xlsx, .xml & .msg
2. The maximum file size for importing to the DMS is **5MB** (per file).

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 ✕

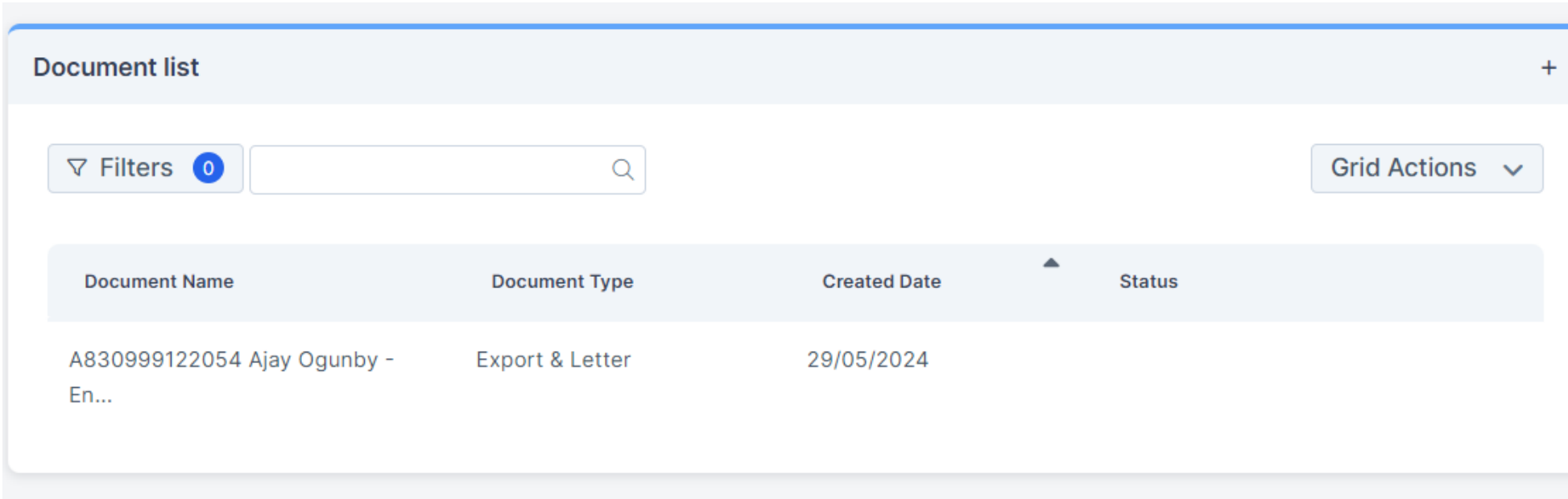
2 out of 2 files successfully matched Document Name : Apply

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**



Document list

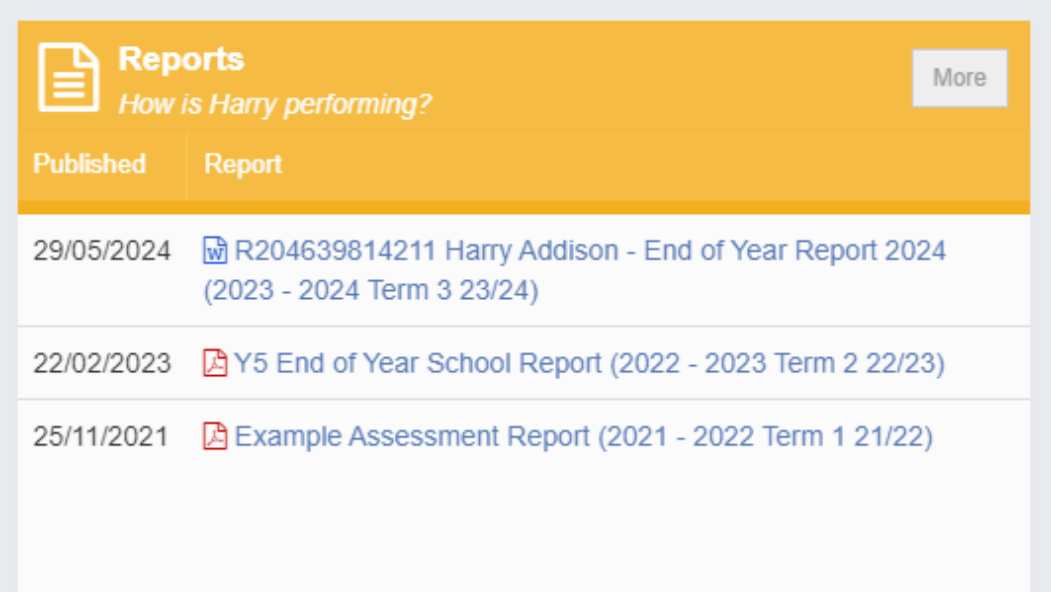
Filters 0 Grid Actions

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.

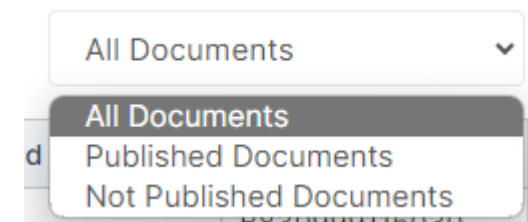


The screenshot shows a 'Reports' panel for a student named Harry Addison. The panel has a yellow header with a document icon, the title 'Reports', and the subtitle 'How is Harry performing?'. A 'More' button is in the top right corner. Below the header is a table with two columns: 'Published' and 'Report'.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

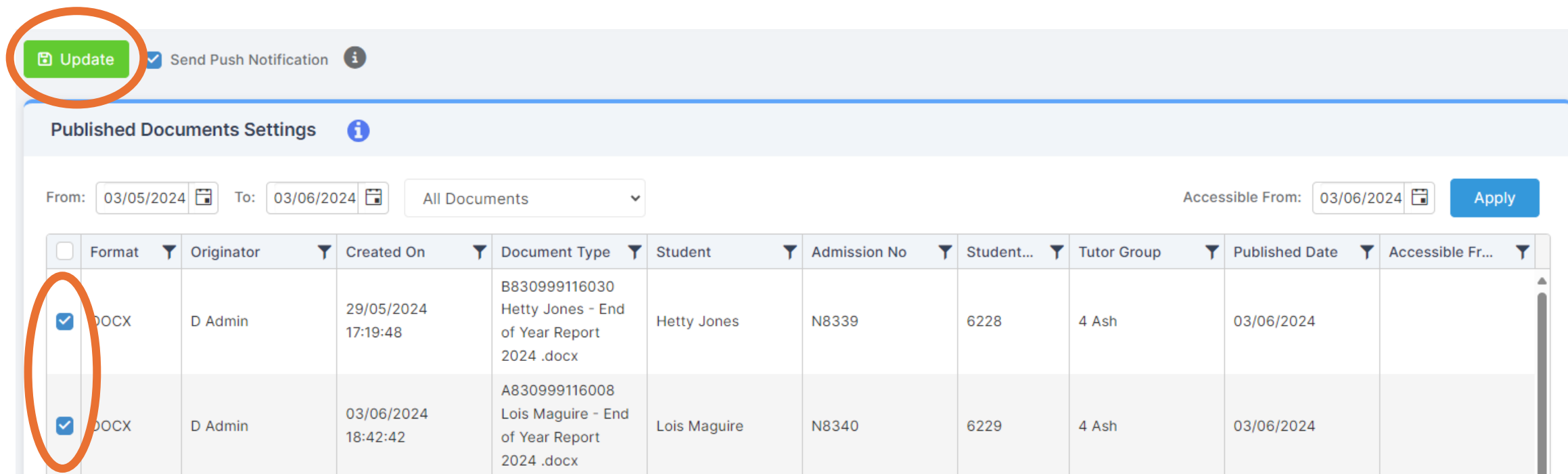
From: 03/05/2024 To: 03/06/2024 All Documents Accessible From: 03/06/2024 Apply

<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**

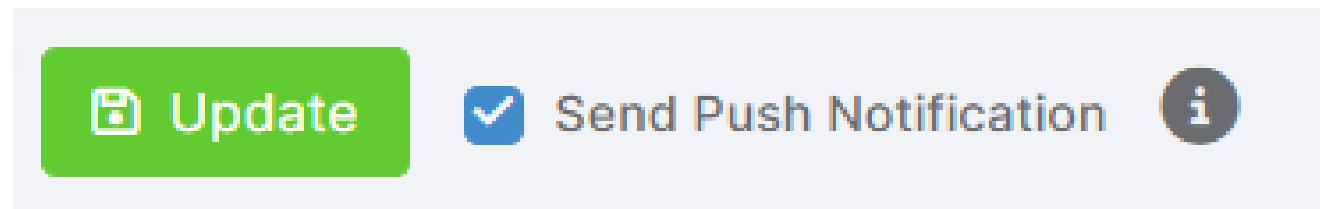


The screenshot displays a user interface for managing published documents. At the top left, a green 'Update' button is circled in orange. To its right is a checked 'Send Push Notification' option. Below this is a section titled 'Published Documents Settings' with a date range filter (From: 03/05/2024, To: 03/06/2024), a dropdown menu set to 'All Documents', and an 'Accessible From' date (03/06/2024) with an 'Apply' button. The main area contains a table with columns for selection, format, originator, created on, document type, student, admission number, student ID, tutor group, published date, and accessible from. Two rows are visible, both with checked selection boxes circled in orange.

<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.

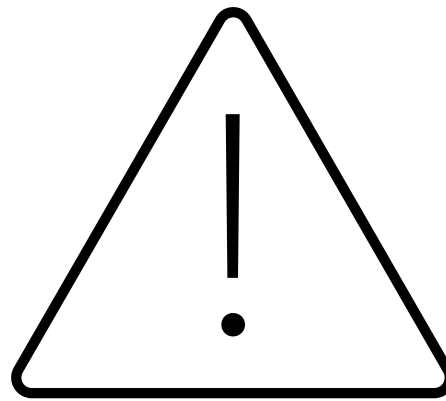


Housekeeping

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




Data Archival (1)




- **Data Archiving** is usually used as a form of housekeeping to streamline the data you are actively holding in your Bromcom site. This process will archive the information stored against the oldest **Academic Year** in the system.
- Data concerning **Attendance, Assessment Results, Behaviour Events, and Exam Results** will be moved into the **Archive Tables** meaning that they cannot be accessed from the system other than through the **Archived Data Reporting Domains**.
- 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) – Important Note

- Before performing **Data Archiving** please first confirm with your **GDPR** officer that they are happy for you to complete this process, and that you are archiving the correct data. This process is **Irreversible** so it is important that you are certain you are **Archiving** the correct data prior to following the steps in this guide.
 - Running the **Data Archiving** process will cause significant performance issues for anybody who is using your schools system whilst the process is running. So, it is recommended that you run this process on a day when users do not require access to Bromcom.
 - Further guidance: [How to Use Data Archiving – Bromcom – Documentation Centre](#)
- 

Data Archival (3)

- 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 (4)

- 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**.
- 

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.
 - Compliance with GDPR.

[How To Manage the DMS – Bromcom – Documentation Centre](#)



Managing the DMS (2)

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

Storage Usage 15%

My Documents ⓘ


Filters 0 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 (4)

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 (3)

- 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.**


Managing the DMS (6)

- 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**.


Important Note: please be aware that archiving data will not free up space in the DMS



Remove Orphaned DMS Records (1)

- 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.
- 

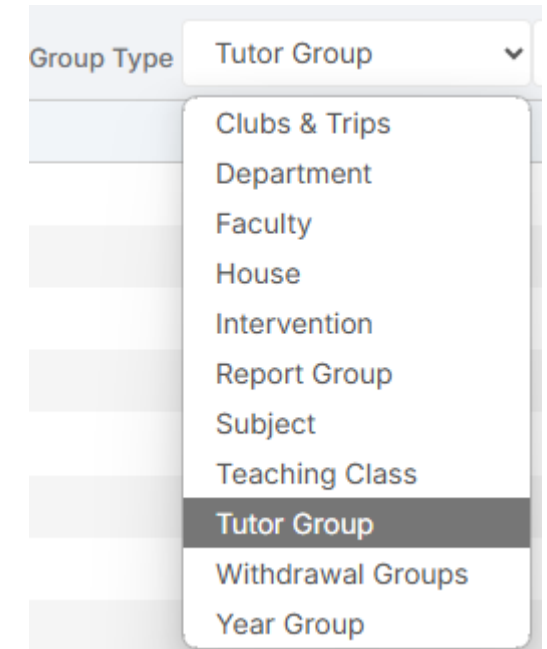
Managing Rooms

- 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 the 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.
 - You can also use this to set up new users with future permissions
- 

Check Third Party 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 Access Permissions and Logs**
 - These can then be disabled through **Modules > Setup > User accounts** in the same way as other user accounts.
- 

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 i

Please choose an outward code for validation:

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

Grid actions:

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:

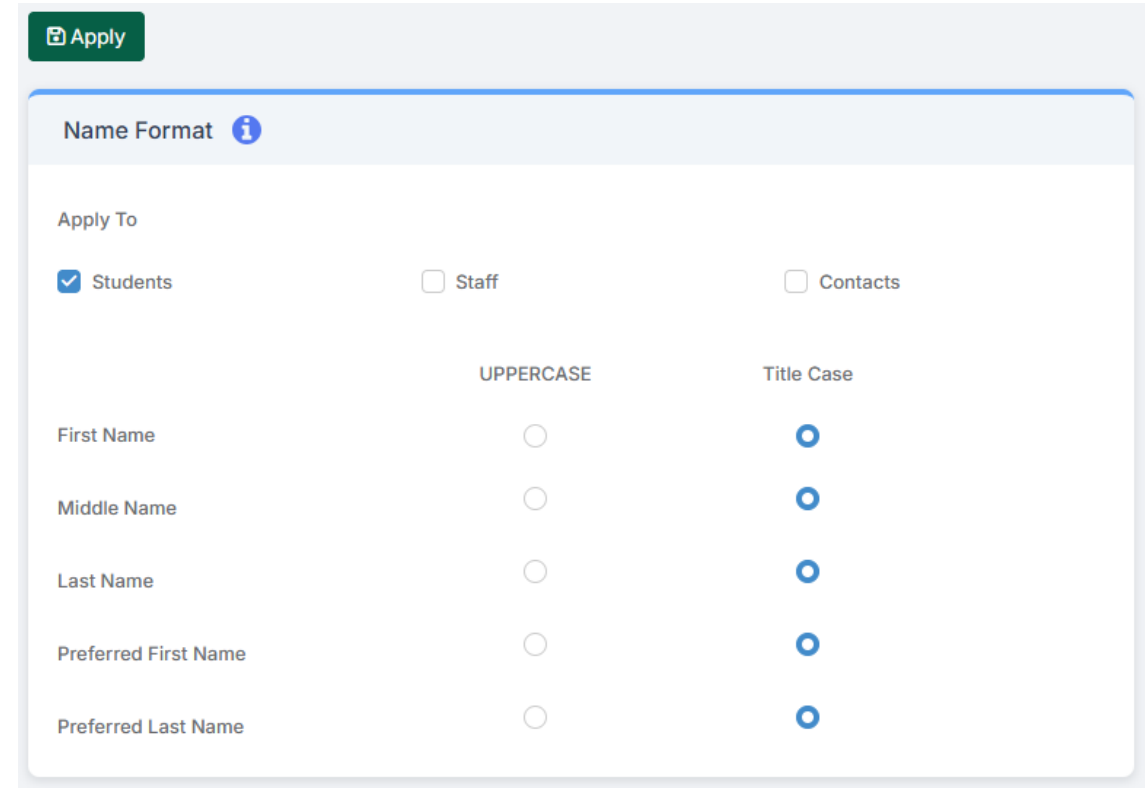
NOTE: Value in brackets next to outward code shows the number of unvalidated addresses

Grid actions:

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>

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.

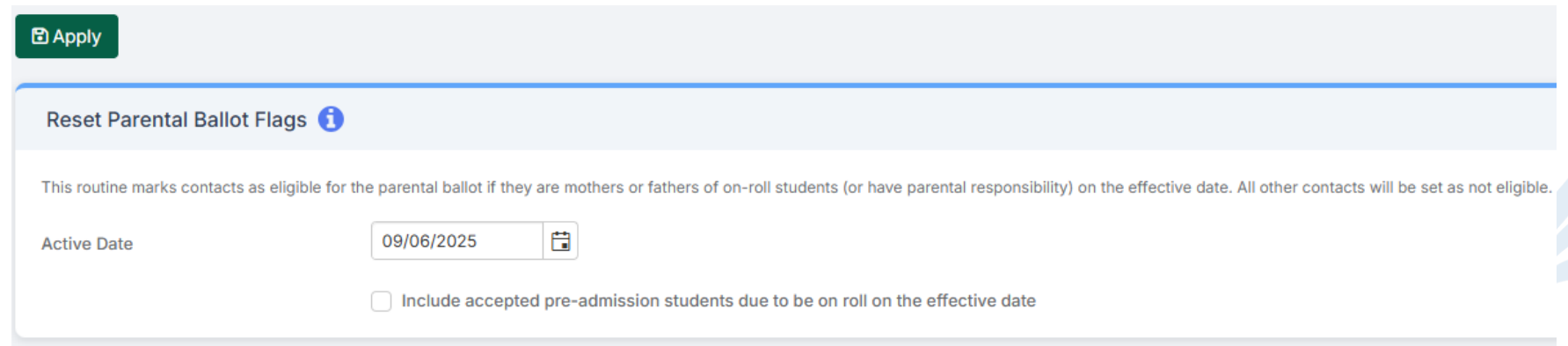


The screenshot shows a web interface for configuring name formats. At the top left, there is a green button labeled "Apply". Below it, the title "Name Format" is displayed with an information icon. The "Apply To" section contains three checkboxes: "Students" (checked), "Staff", and "Contacts". Below this, there are two columns of radio buttons: "UPPERCASE" and "Title Case". The "Title Case" column has five radio buttons, all of which are selected. The "UPPERCASE" column has five radio buttons, all of which are unselected. 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 'Reset Parental Ballot Flags' with an information icon. A descriptive paragraph states: '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.' There is an 'Active Date' field with a calendar icon, containing the date '09/06/2025'. Below this is a checkbox labeled 'Include accepted pre-admission students due to be on roll on the effective date', which is currently unchecked.

Update Salutations & Addressee

- This process updates the student's parental salutation and addressee 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



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.

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 tutor groups.
 - 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).
- 

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**.
- <https://docs.bromcom.com/knowledge-base/2026-admissions-guide/>

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**.




Warning: Finalising Admissions

- Don't admit pre-admission children too early as access to MCAS becomes unavailable.
 - Once admitted the child will no longer appear in a Pre-Admissions group and parents will not be able to use MCAS until their admission date.
 - Their status moves from pre-admission to on-roll but they won't actually be admitted until their admission date. Access to MCAS is not available while they are in this limbo state.



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-compulsory 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.





**Thank you for your
time**



coventry.gov.uk