studywiz

Studywiz Administrator's Guide
End of Year Rollover

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Introduction

As a Studywiz Administrator you can make many changes to a school's Studywiz hierarchy for a new school year. Many changes can be made very easily by exporting, editing and re-importing CSV files. The most common end-of-year rollover tasks are:

- Remove teachers, students and parents who have left the school
- Add new teachers, students and parents
- Add and remove classes
- Remove teachers and students from classes and add them to others
- Manage Activities and Folders.

This document explains how a Studywiz Administrator can perform these rollover actions using the Studywiz Update tool.

Update Tool

The Update tool is accessed through the Administration section of Studywiz. Detailed instructions are provided in the *Studywiz User and Hierarchy Import Guide*. Please contact Studywiz Support (support@studywiz.com) if you need a copy of this guide.

Changes can also be made manually. For instructions on making changes manually, please see the *Studywiz Administrator's Guide*.

Before You Use the Update Tool

It's important that the Studywiz database is backed up before making any changes using the Update tool. To back up the Studywiz database.

1. In the Administration section, click **Admin Utilities** then **Update**. The Database Backup screen appears.
2. Click **Back up database now**. The database is backed up. Once the backup is complete, the name of the backup file will appear in the output log.
3. Make a note of the backup filename.

   If the outcome of the Update process is undesirable, Studywiz can be rolled back to this backup by Studywiz Support. If you require a database rollback, please email us with the name of the backup file (or the approximate time that the backup was made), and we will roll-back your database.

External IDs

In Studywiz, External IDs (such as `StudentID`, `TeacherID`, `ClassID` etc.) are unique identifiers that are used by the Update tool. By using an existing item's External ID in a CSV file, the Update tool knows that you are referring to the existing item. If the Update tool doesn't recognise the External ID, generally it will create a new item with the specified details. If you want to make changes to the existing users or hierarchy, be sure to use their current External IDs in the CSV files.

Users
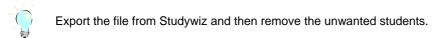
Delete Unwanted User Accounts

Follow the procedures in this section to use CSV imports to delete unwanted students, teachers and parents from Studywiz.

For full instructions on using the Studywiz Update tool, see the *User Hierarchy Import and Export* section of the *Studywiz Administration Guide*.

Delete Unwanted Student Accounts

Students who are no longer enrolled at the school should be removed from the system so that they don't appear in Classes or Groups and to make room for new students. Deleted students cannot log into Studywiz, and the contents of their eLockers are no longer available.

1.   Create a `Students.csv` file which contains all the existing students that you want to **keep**.

        Export the file from Studywiz and then remove the unwanted students.

2.   Place the file into a zip archive and use the Update tool to import it into Studywiz. The file details are shown in the Data Preview panel.

3.   Scroll down to the Student Options section.

4.   Set the **Delete Students not found in the students.csv file** option to **Yes**.

5.   Continue with the update. All students **not** contained in the `Students.csv` file are deleted from the system.

Delete Unwanted Teacher Accounts

You may wish to delete teachers that are no longer working at the school, so that they don't appear in Classes or Groups. Deleted teachers cannot log into Studywiz, and the contents of their eLockers are also no longer available.

1.   Create a `Teachers.csv` file which includes all the existing teachers that you want to **keep**.

Export the file from Studywiz and then remove the unwanted students.

2.   Place the file into a zip archive and use the Update tool to import it into Studywiz. The file details are shown in the Data Preview panel.

3.   Scroll down to the Teacher Options section.

4.   Set the **Delete Teachers not found in the teachers.csv file** option to **Yes**.

5.   Continue with the update. All teachers **not** contained in the `Teachers.csv` file are deleted from the system.

Delete Unwanted Parent Accounts

You may wish to delete parents of students who are no longer enrolled at the school, so that they don't appear in Groups. Deleted parents cannot log into Studywiz, and the contents of their eLockers are no longer available.

1.   Create a `Parents.csv` file, which includes all the existing parents that you want to **keep**.

2.   Place the file into a ZIP archive and upload it to the Update tool. The file details are shown in the Data Preview panel.

3. Scroll down to the Parent Options section.

4. Set the **Delete Parents not found in the parents.csv file** option to **Yes**.

5. Continue with the update. All parents **not** contained in the `Parents.csv` file have now been deleted from the system.

Add New User Accounts

You may wish to add new students, teachers and/or parents at the beginning of the new school year. Students need to be assigned to at least one class, and parents need to be assigned to at least one student. In most versions, teachers also need to be assigned to at least one class.

Students, teachers and/or parents can all be created at the same time by including the relevant files in a single zip archive. For example, to add new students and teachers to the system at once, place the `Students.csv`, `Class_Students.csv`, `Teachers.csv` and `Class_Teachers.csv` files into a single zip file.

Create new Students and Assign Them to Existing Classes

1. Create a `Students.csv` file that contains details of the new students.

2. Create a `Class_Students.csv` file that contains the class relationships for the new students.

3. Place the files into a ZIP archive, upload it to the Update tool, and complete the update. Accounts for the new students are created, and the students are assigned to the specified classes.

Create new Teachers and Assign Them to Existing Classes

1. Create a `Teachers.csv` file that contains details of the new teachers.

2. Create a `Class_Teachers.csv` file that contains the class relationships for the new teachers.

3. Place the files into a ZIP archive, upload it to the Update tool, and complete the update. Accounts for the new teachers are created, and the teachers are assigned to the specified classes.

Create new Parents and Assign Them to Existing Students

1. Create a `Parents.csv` file that contains the details of the new parents.

2. Create a `Parent_Students.csv` file that contains the student-parent relationships for the new parents.

3. Place the files into a ZIP archive, upload it to the Update tool, and complete the update. Accounts for the new parents are created, and the parents are assigned to their students.

Update Users' Details

At the beginning of a new school year, you may wish to update existing users' details . For example, you may wish to update the address details of all students, or you may wish to reset all teachers' passwords.

This procedure will not make changes to the classes and groups to which the users are assigned. For information on changing users' class/group relationships, please see the *Classes and Groups* section of this document.

1. Create the `Students.csv`, `Teachers.csv` and/or `Parents.csv` files (as needed), containing the new details of the user whose details you wish to change.

    > ⚠️ Include **only** the mandatory fields and the field(s) you wish to update. This ensures that only the necessary data is updated. Fields that aren't included in the CSV file will remain unchanged for the users.
    >
    > For example, exclude the Password field to prevent resetting users' passwords.

2. Place the file(s) into a ZIP archive, upload it to the Update tool, and complete the update. Existing details for the specified users have now been updated with the details contained in the CSV file(s).

Leave Users in the System and Remove Them from Classes

You may wish to leave some users in Studywiz for a period of time, even though they won't be active during that time. For example, if a teacher is on extended leave, or a student is on exchange. Studywiz requires that a Student is assigned to at least one class, and in most versions it is also a requirement that a Teacher is assigned to at least one class. So to leave these users in the system, while not being part of any classes, they will need to be placed in a 'holding' class. You may also wish to place this class in a 'holding' School/Level, so that it is completely separate from all other classes.

You can create the holding class and Level/School using the Update tool, by importing `Classes.csv`, `Levels.csv`/`Schools.csv` and `Level_Classes.csv`/`School_Classes.csv` files containing details of the new class and level/school. You can also create them manually in the Administration interface (making sure to give the class an External ID: `ClassID`).

After the class has been created, you can assign the inactive users using the Update tool:

1. Create the `Class_Students.csv` and `Class_Teachers.csv` files (as required), assigning the inactive users to the holding class.

2. Place the file(s) into a ZIP archive, upload it to the Update tool, and complete the update. The users have now been taken out of all classes, and assigned only to the holding class.

Classes and Groups

Delete Unwanted Classes

You may wish to delete classes that are no longer needed. Any Activities contained in the deleted classes will remain in the system, but will only be accessible to Administrators by using the Activity Search tool.

1.   Create a `Classes.csv` file, which includes all the existing classes that you want to **keep**.

> Export the file from Studywiz and then remove the unwanted classes.

2.   Place the file into a zip archive and use the Update tool to import it into Studywiz. The file details are shown in the Data Preview panel.

3.   Scroll down to the Class Options section.

4.   Set the **Delete Classes not found in the Classes.csv file** option to **Yes**.

5.   Continue with the update. All classes **not** contained in the `Classes.csv` file are deleted from the system.

Add New Classes

Follow this procedure to add new classes at the start of the new school year without deleting old classes.

1.   Create a `Classes.csv` file, which includes the details of the new classes.

2.   Create a `School_Classes.csv`/`Level_Classes.csv` file, which assigns the new classes to your existing Schools/Levels.

3.   If your Studywiz deployment uses Subjects, create a `Subject_Classes.csv` file to assign the new classes to your existing Subjects.

4.   Place the files into a ZIP archive and upload it to the Update tool.

5.   Continue with the update. The classes defined in the `Classes.csv` file are created and assigned to the specified Schools/Levels and Subjects (where applicable).

Move Students and Teachers to new Classes

Follow this procedure to remove students and teachers from their old classes and place them in their new classes. They will be placed **only** in the classes specified in the CSV files.

1.   Create a `Class_Students.csv` file, which includes the details of the students and their new class relationships.

2.   Create a `Class_Teachers.csv` file, which includes the details of the teachers and their new class relationships.

3.   Place the files into a ZIP archive and upload it to the Update tool.

4.   Continue with the update.

Add Students and Teachers to new Classes and Keep Them in Their Current Classes

Follow this procedure to add students and teachers to additional classes, without removing them from their old classes.

1.   Create a `Class_Students.csv` file, which includes the details of the students and their new class relationships.

2.   Create a `Class_Teachers.csv` file, which includes the details of the teachers and their new class relationships.

3.   Place the files into a zip archive and use the Update tool to import it into Studywiz. The file details are shown in the Data Preview panel.

4.   Scroll down to the Student Options section.

5.   Set the **Remove students from any classes not listed in the CSV files** option to **No**.

6.   Scroll down to the Teacher Options section.

7.   Set the **Remove teachers from any classes not listed in the CSV files** option to **No**.

8.   Continue with the update. The students and teachers are now still assigned to their original classes, in addition to those classes specified in the CSV files.

Activities and other content

Users' eLocker Contents

Users' eLocker contents will remain as-is during the Update process, **except** if you are deleting unwanted Students, Teachers or Parents. When a user is deleted, their eLocker contents are no longer available.

Users' Messages

Users' messages will remain as-is during the Update process, **except** if you are deleting unwanted Students, Teachers or Parents. When a user is deleted, their messages are no longer available.

Re-assign Ownership of Folders and Activities

Folders and Activities in a class or group can be re-assigned to any other teacher in that class/group. This essentially changes the ownership, so that the new owner can edit or delete the folder/Activity as if they had created it (even if "Allow Global Edit" has not been enabled for the folder/Activity).

Re-assign the Ownership of a Folder

1. Click the **Activities** menu and then click **Folder Search**. The Folder Search page appears.
2. Search for the desired folder.
3. In the search results, click **Edit** next to the desired folder. The Edit Folder page appears.
4. From the **Re-assign Folder To** drop-down, select the teacher to whom you wish to assign the folder.
5. Click **Save**.

Re-assign the Ownership of an Activity

1. Click the **Activities** menu and then click **Activity Search**. The Activity Search page appears.
2. Search for the desired Activity.
3. In the search results, click **Edit** next to an Activity. The Edit Activity page appears.
4. In the **Re-assign Activity To** drop-down, select the teacher to whom you wish to assign the Activity.
5. Click **Save**.

Unpublish Activities

1. Click the **Activities** menu and then click **Activity Search**. The Activity Search page appears.
2. Search for the desired Activities.

> The Advanced Search is useful in this situation, unless you want to unpublish all activities.

3.   Use the checkboxes to the left of the Activities list to select Activities, or click **Select All**.

4.   Above the Activities list, from the drop-down list, select **Unpublish Selected Activities**.

5.   Click the **OK** button. A confirmation message appears in the top-right corner of the page.

Other Actions

Roll Back the System after Update

The rollback is performed by Studywiz Support. If you require a database rollback, please email us with the name of the backup file (or the approximate time that the backup was made), and we will roll-back your database.

Reset the Deployment

Resetting your deployment will result in all students, teachers, parents and administrators (except for a default Administrator account) being deleted from the system. All Classes, Levels/Schools, Subjects, Activities, messages, Learning Plans, eLocker contents etc. will no longer be accessible. Please contact Studywiz Support of you would like to completely reset your deployment.

Other Changes

The flexibility of the Update tool means that there are many more rollover scenarios possible than those covered in this document! If you would like advice on making other changes, please email Studywiz Support.

Advanced Update Options

The table below lists the available Advanced Update Options, and their default values.

Advanced Update Option Default Settings

Student Option	Default Setting
Delete Students not found in the Students.csv file	No
Remove Students from any classes not listed in the CSV files	Yes
Remove Students from any groups not listed in the CSV files	Yes
Remove Students from classes without External IDs	Yes
Remove Students from groups without External IDs	Yes
Class Option	
Delete Classes not found in the Classes.csv file	No
Teacher Options	
Delete Teachers not found in the Teachers.csv file	No
Remove Teachers from any classes not listed in the CSV files	Yes
Remove Teachers from any groups not listed in the CSV files	Yes
Remove Teachers from classes without External IDs	Yes
Remove Teachers from groups without External IDs	Yes
Parent Option	
Delete Parents not found in the Parents.csv file	No
Remove Parents from any students not listed in the CSV files	Yes
Remove Parents from any groups not listed in the CSV files	Yes
Remove Parents from groups without External IDs	Yes