



EOY - BEST PRACTICE

Training Template + Notes for Customer Use

Rev 1 – 4 December 2019



PLACEMENTS – CLEAN UP PENDING



Pending placements are often those that were in the oven, but never quite finished baking. We recommend reviewing anything in the “Pending” status at the end of the year - archive any pending placements that are not needed or related to a future placement so you don’t stumble over them next year.

PATHWAYS STUDENTS HOSTS **PLACEMENTS** GROUPS SCHOOLS PROVIDERS SMS HELP Placement Find

Placements: Pending

Add Placement

Placement Explorer

WORKFLOW

- Pending
- Arranged
- In Progress
- Complete
- On Hold
- Cancelled
- Incomplete
- Archived

PLACEMENT LISTS

- Starting Soon

ID	Host Name	Student Name	School	Vocation	Placement Mode	Start Date
P810660	Adobe Systems	CAPALDI, Peter	HHS	Construction	Work Experience	04-Mar-2019
P810663	Apple	FEDERIGHI, Craig	HHS	Business Services	Work Experience	11-Mar-2019
P585840	Kelly Services	DEPP, Johnny	UCALASM	Early Childhood Studies	Work Experience	05-Aug-2019
P1158281	3M					
P1158286	Adobe Systems					
P1158287	Apple					
P1065690	Apple					

PATHWAYS STUDENTS HOSTS **PLACEMENTS** GROUPS SCHOOLS PROVIDERS SMS HELP Placement Find

Placements: Details

Add Placement

Placement Explorer

WORKFLOW

- Pending
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- Archived

PLACEMENT LISTS

- Starting Soon
- Ending Soon

Adobe Systems & Peter Capaldi

Placement Details Activities Files (0) Mail Merges Email

PLACEMENT DETAILS

Status **PENDING**

Student **CAPALDI, Peter** [Change](#)

Guardian **Bart Sampson (Father)**

School **A Happy School**

Teacher **Veronica Veritas**

Coordinator **Kara Paap**

Group **G1061 : 2019 - Yr11 Work Experience - Scho...** [Change](#)

Date Range **04-Mar-2019 to 08-Mar-2019**

Times

Pattern **One Week Block**

Duration **5 day(s) - 35 hour(s)**

HOST DETAILS

Host Name **Adobe Systems**

Host Contact **Leo DiCAPRIO**

Host Supervisor **Leo DiCaprio**

Host Address **5 Dudley Street, Highgate Hill, QLD 4101, Australia**

Dress Req **NO short skirts or shorts; NO offensive logos; NO hipster pants. NO visible piercings or tattoos and NO bare midriffs. Hair and overall appearance should be neatly groomed at all times. updated**

Attendance **Students must attend an orientation**

Student Reqs **As directed by Host during induction at placement commencement.**

Safety Notes **As directed by Host during induction at placement commencement.**

Student Duties **As directed by Host during induction at placement commencement.**

Menu:

- Add Activity
- Upload File
- Duplicate
- Archive
- Delete

ACTIVE HOSTS CHECK



- Are there any hosts that are now out of business that you need to archive?
- Are there any hosts that are unsuitable for placements in the future?
- Archive them and be sure to indicate the reason and a note. This helps in the future if the host pops up again and you need to know why they were archived originally.

The screenshot shows the Pathways software interface. The top navigation bar includes 'PATHWAYS', 'STUDENTS', 'HOSTS' (selected), 'PLACEMENTS', 'GROUPS', 'SCHOOLS', 'PROVIDERS', 'SMS', and 'HELP'. A search bar on the right says 'Host Find'. The left sidebar has sections for 'HOST OPTIONS' (Host Explorer, My Favourites, Host Custom Lists) and 'HOST BROWSING' (Browse By Industry, Browse By Vocation, Browse By Tag, Browse By Suburb, Browse on Map, Browse Agreements, Host Certificates, Host Usage, Never Hosted, Activity List). The main content area is titled 'Hosts : Details' and shows the details for 'Activ8 Technologies'. The 'Status' is 'ACTIVE', highlighted with a red arrow. The 'Main Contact' is 'Harry Potter (Managing Director)'. The 'PLACEMENT SNAPSHOT' shows: 2 Pending, 1 Arranged, 0 In Progress, 31 Complete, and 1 On Hold. A modal window titled 'Archive Host Record' is open, with a 'Reason' dropdown set to 'Ceased Trading' and a 'Notes' text area containing 'Closed business in November 2019'. An 'Archived' button is at the bottom right of the modal. The background shows a list of email/related notes for the host.

ARCHIVE DEPARTING TEACHERS



Archive any teachers that won't be at your school next year – their history is retained.

The screenshot displays the Pathways Schools Management System interface. The top navigation bar includes links for STUDENTS, HOSTS, PLACEMENTS, GROUPS, **SCHOOLS**, PROVIDERS, SMS, and HELP. A search bar on the right is labeled 'School Find'. The left sidebar contains sections for SCHOOLS (Active Schools, Archived Schools, List by Type, Recycle Bin) and TEACHERS (Teacher List, Teacher Emails, Teacher SMS). The main content area shows the 'A Happy School' details page. The 'SCHOOL DETAILS' section includes fields for Status (ACTIVE), Short Name (HHS), Principal (Seymour Skinner), Phone (01222454573), Emergency Ph, Fax, Email, Type, Office Hours, and Address. The 'TEACHERS & CONTACTS' section shows a table with columns for Name & Position, Phone/Mobile, and Email Address. The table lists two teachers: DUMBLEDORE, Albus (Teacher) and KLUMP, Sherman (Work Placement Coordinator). A purple arrow points from the 'KLUMP, Sherman' entry in the table to the 'Edit School Teacher' modal. The modal has a title bar with a close button. It contains a 'Status' section with radio buttons for 'Active' and 'Archived', where 'Archived' is selected. Below this are input fields for 'First Name' (Sherman), 'Last Name' (Klump), 'Position' (Work Placement Coordinator), 'Phone', 'Mobile', 'Email', and 'Notes'. A 'Save' button is at the bottom right. To the right of the modal is the 'SCHOOL PORTAL' section with a 'Portal Access' toggle (On/Off) and buttons for 'Send Welcome Email', 'Send Password Reset Email', and 'Log in As School Coordinator'. Below that is the 'ACCOUNT LOGIN' section with fields for 'Username' (SallyS1586) and 'Password' (Pn24Dyp6).

ARCHIVE GROUPS



- Archive groups from the current calendar year so you aren't tripping over them. Check the Open, Closed and On-Hold Class Lists
- If you are really prepared, **create NEW groups** for next year – **never rename existing groups** so they can be used for multiple years unless the group is truly a multi-year cohort.

PATHWAYS STUDENTS HOSTS PLACEMENTS **GROUPS** SCHOOLS PROVIDERS SMS HELP

Groups: Details

G1075 : 2019 - Year 10 Work Experience

Details Activity Log (13) Files (0) Visit Planner Mail Merges SMS Emails Registrations

GROUP DETAILS

Group Status: **OPEN**
Group Timing: Ongoing
School: A Happy School
Coordinator:

TEACHER PORTAL

Show Group: **YES**
Show Placements: **YES**
Rego Approval: **YES**
Email on Approval: **NO**

WEB REGO DETAILS

Rego Status: **OPEN**
Rego Code: 77276
Rego Form: Test Form 1

GROUP NOTES

LINKED STUDENTS & PLACEMENTS (9)

Student	Host	Start Date	End Date	Placement Status
27-Jul-19				COMPLETE
15-Mar-19				COMPLETE
30-Apr-19				COMPLETE
31-May-19				COMPLETE
02-Aug-19				COMPLETE
15-Feb-19				COMPLETE
27-Sep-19				COMPLETE
06-Mar-19				COMPLETE

Edit Group Details

Group Status: ☐ DRAFT ☒ OPEN ☐ CLOSED ☐ ON HOLD ☐ **ARCHIVED**

Group Name: 2019 - Year 10 Work Experience

Timing/Weeks: ☒ Ongoing ☐ Specific Weeks

Group Type: Students & Placements

Coordinator: PAAP, Kara

Area of Study: Optional: If the Group is Industry-Specific....

School: A Happy School

Teacher: Select a Teacher (Optional)...

TAFE/Provider: Select a Provider if Applicable...

Provider Contact: Select a Provider Contact (Optional)...

Start Date: End:

Group Colour: Select Colour...

Students: (Expected/Planned number of students)

Delete Group Save Changes

END OF YEAR TOOLS



You are now ready to run the Student Rollover and Placement Rollover. You can find the End of Year tools on the student dashboard in the right column or in the Setup menu -

<https://pathways.cloud/Coordinator/EOY>

The image displays two screenshots of the Pathways system interface, illustrating where to find the End of Year Tools.

Top Screenshot: Student Dashboard

- Header:** PATHWAYS, STUDENTS, HOSTS, PLACEMENTS, GROUPS, SCHOOLS, PROVIDERS, SMS, HELP. Search bar: Student Find.
- Left Column:**
 - Welcome:** Welcome to the Student portal. This is where you can manage all your student records. Be sure to check the list options on the left.
 - YEAR SHORTCUTS:** Add Student button. List: Year 10 (2), Year 11 (11), Year 12 (6), Past (2).
 - STUDENT LISTS:** Student Explorer, Student Archive, Recycle Bin, Custom Lists, Recently Added.
 - STUDENT BROWSING:** Browse by Industry, Browse by Tag, Browse by Course, Browse by Program, Students With Placements, Students Without Placements.
- Right Column:**
 - RECENTLY VIEWED:** Table with columns for icon, name, and time. Items include "A Happy School" (Last 7 Days, Over a week ago) and "Anderson School" (Over a week ago).
 - TOOLS:** Student Files Explorer, Student Activity Explorer, Bulk Archiving, End Of Year Tools, Student Upload & Import.


Bottom Screenshot: Pathways Setup

- Header:** PATHWAYS, STUDENTS, HOSTS, PLACEMENTS, GROUPS, SCHOOLS, PROVIDERS, SMS, HELP. Setup: Home. Logout.
- Left Column:**
 - GENERAL:** Default Values for New Records, File Categories (for uploads), Industry Groups and Areas of Study, Office Locations, Pathways User Accounts, Term & Week Numbers, Workplace Unions, End Of Year Rollover.
 - CURRICULUM:** Course Names & Codes, Units of Competency.
 - SCHOOLS & PROVIDERS:** School Types, School Activity Types, Provider Types, Provider Activity Types.
- Right Column:**
 - STUDENTS:** Student Activity Types, Student Activity Tags, Student Archive Reasons, Student Guardian Relationships, Student Profile Sections, Student Programs, Student Tags, Student Tag Categories, Student Year Levels.
 - HOSTS:** Host Activity Types, Host Address Types, Host Archive Reasons, Host Tags, Host Agreement Status Levels, Host Bulk Updating.
 - ATTENDANCE:** Attendance Outcomes, Attendance Templates.
 - PLACEMENTS:** Placement Activity Types, Placement Cancellation Reasons, Placement Checklist Items, Placement Modes, Placement Patterns, Placement Tags, Placement Vocations.
 - TEMPLATES:** Mail Merge Templates, Email Templates, Postcard Template, SMS Templates, Shared Reply Addresses.
 - REGISTRATION:** Registration Email Templates, Student Registration Forms.
- Right Side Note:** Almost everything in Pathways can be customised to suit your exact needs. This screen allows easy access to all the drop-down menus in Pathways. We recommend caution and care when editing these, to ensure you don't delete any records that may have been used elsewhere in Pathways. Visit Knowledgebase.


END OF YEAR TOOLS – STUDENT ROLLOVER



This is an automated process whereby student year levels are increased by one, and Year 12's are moved into the "Past" and "Archived" status. Archived students retain all their details, but are changed to the Archived status so they are accessible but you aren't tripping over their records in the future.

 **PATHWAYS** STUDENTS HOSTS PLACEMENTS GROUPS SC

Setup: End Of Year Tools

 **End Of Year Tools**

The end of year processes are quite simple and designed to perform the typical rollover tasks to end one school year and prepare for the next. The below tools each focus on a different process you may wish to address at the end of the year, or early in the new year.

STUDENT YEAR LEVEL ROLLOVERS

This process prepares the student database for next year's students - a group EOY rollover.

1) Increments all student year levels by +1 2) Existing Year 12's are moved to a "Past" year level 3) Existing Year 12's are changed from Active status to Archived status. 4) All students have an activity log entry added to make a note of when this rollover occurred.

[Run Student Rollover](#)

PLACEMENT COMPLETION + ARCHIVING

This process tidies up the placement workflow ready for next year by archiving placements no longer needing additional action in the future. Naturally all can be accessed through search or their linked student or host.


1) Updates any "Arranged" placements with an end date in the past to "Complete" status
2) Archives any "Complete" status placements to "Archived"
3) Archives any Cancelled or Incomplete or On Hold placements that have an end date in the past
4) All students have an activity log entry added to make a note of when this rollover occurred.

[Run Placement Rollover](#)


END OF YEAR TOOLS – PLACEMENT ROLLOVER



The EOY rollover for placements does a general tidy up and archive of placements. All details are retained as placement history is invaluable in future years, however we keep the pending/arranged/complete placement pipeline clear ready for next year's placements.

 **PATHWAYS** **STUDENTS** **HOSTS** **PLACEMENTS** **GROUPS** **SC**

Setup: End Of Year Tools

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[Run Placement Rollover](#)

END OF YEAR TOOLS - CONTINUED




After the rollover is complete a new history item will be added so you can easily see if it's already been run and to alert you in the situation where it's being run twice.

**PATHWAYS**

[STUDENTS](#) [HOSTS](#) [PLACEMENTS](#) [GROUPS](#) [SCHOOLS](#) [PROVIDERS](#) [SMS](#) [HELP](#)

Setup: End Of Year Tools

Setup • [Home](#) • [Logout](#)



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ROLLOVER HISTORY

Date	Time	User	Rollover Type
15-Nov-2019	03:59 PM	TEST USER	Student Rollover
22-Jan-2019	03:14 PM	TEST USER	Placement Rollover
22-Jan-2019	03:10 PM	TEST USER	Student Rollover
05-Dec-2017	07:29 PM	TEST USER	Placement Rollover
05-Dec-2017	07:29 PM	TEST USER	Student Rollover
05-Nov-2017	10:00 PM	TEST USER	Placement Rollover

[Hide Rollover Reminder](#)



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Note: A student rollover has been run within the last 9 months. Contact the Helpdesk if you need to re-run a rollover or need assistance.