

# Closing out the Current School Year – TIPWIN Campus Quick Guide



## Collect Books from...

- All students as soon as they are no longer using their books
- Those teachers who will be returning books to the book room



## Change Distributed books to Lost for Students

- Either print the Student Distribution Report limited to a transaction of Distributed prior to changing or after changing and limit to transaction of lost. This is your holds or obligation list.
- Remember you can do this by grade level – found under **Database** and **Closing** on the menu bar. *See the next page for instructions.*



## Print Lost Book Letters

- Found under the **Generate Reports** tab, the letter can be generated for one or many students. *Remember letters will only print if distributions have been changed to lost.*



## Perform Physical Count of ALL Books on Campus

- This should be done by at least two people.
- An inventory report should be submitted to your District Coordinator. The District may also perform their own audit of your books.
- Make payment to the District for lost textbooks or replace the losses with used textbooks. If paying for books this should be done as soon as possible so the district can replace books before the start of the next school year.



## Perform the Closing Procedures found at Database>Closing

See the following pages for instructions on closing

You may also call Hayes Software Systems Technical Support line for assistance in performing the closing features – 1-800-495-5993

- Student Tab
  - ✓ Remove Transaction History – *removes "Returned" status from student records*
  - ✓ Delete Payments
  - ✓ Delete Damaged and Worn Out
  - ✓ Advance Student Grades – *should be done before importing new students for the new year*
  - ✓ Delete Students by Grade level or Delete Students with no Current Distributions
- Teacher Tab
  - ✓ Return Distributed Books to Storage (If books are not kept in teacher rooms)
  - ✓ Delete Payments and Damaged and Worn Out
- Consolidate Tab
  - ✓ Teacher Transactions
- Textbooks Tab
  - ✓ Delete Expired Adoption Textbooks
  - ✓ Zero Out Consumables



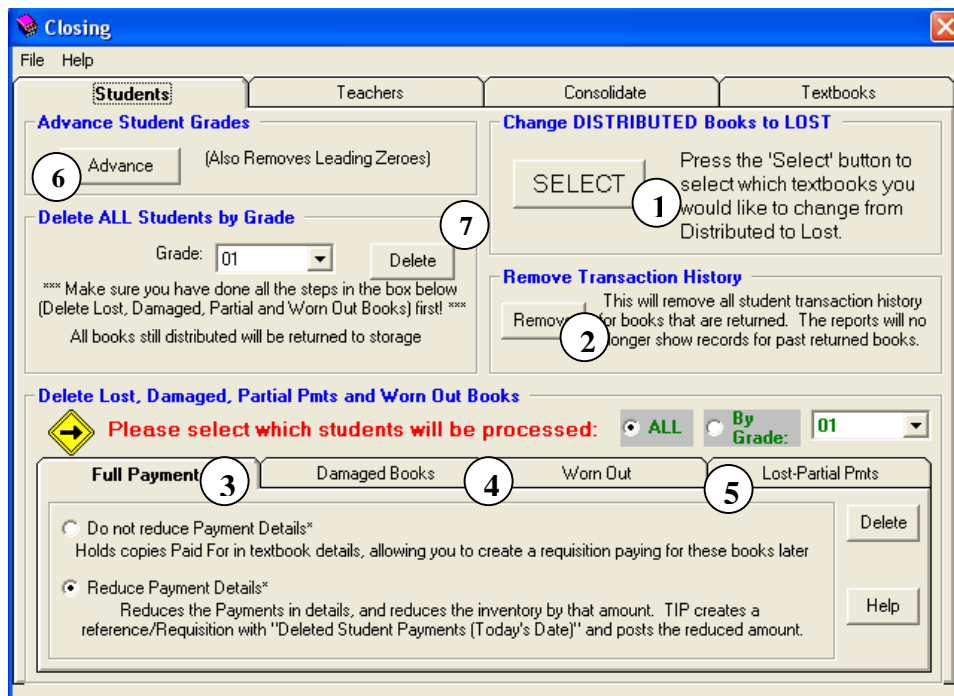
## Before Next School Year

- Import Data – **See the following pages for instruction on importing**
  - ✓ Students
  - ✓ Teachers
  - ✓ Courses
  - ✓ Teacher Schedules
  - ✓ Student Schedules
- Return to storage any books received over the summer
- Print out a Lost Book Report – (*Student Distribution Report limited to Lost*)
  - ✓ You may want to disseminate the report to coaches, extra curricular sponsors, and other faculty members to enlist their help in “motivating” students to clear their accounts
  - ✓ You may also refuse to issue a book to a student that has a loss attributed to their record. *A book will have to be available in the classroom for student use.*
- Update the books database with any new adoption textbooks and increase existing inventory numbers for books you received over the summer.

## Closing Out the Year for Campus TIPWIN

Make a Backup of your data before using any of the Closing features.

After collecting all books from students –  
From **Database** on the menu bar, select **Closing**



### At the Student tab:

1. **Change Distributed Books to Lost** – This is done if everything has been collected. You may want to start by **changing to lost** for particular grade level. This is especially important at the high school level for those campuses with 12<sup>th</sup> graders who will not be returning to campus the following school year. You need to collect from them as early as possible to give students time to clear their record.  
  
Once this step is complete, you can begin printing your **Lost Book Letters**. From the Generate Reports tab, select "Other" and then select the Lost Book Form Letter. The report can be limited by Student and then by grade. If printing for ALL, simply select the Continue button.
2. Once your physical count has been completed you may want to **Remove Transaction History**. This removes all Return records – those books which were distributed to a student and then returned by the student. Some campuses like to keep this information until just before school begins. This allows them to see the entire student record. This function can be done anytime before the next school year begins.
3. **Delete Payments** – You will want to delete payments if you have made payment to the district and refunds will no longer be allowed. Select the **Reduce Payment Details** button. This removes the transaction from the student as well as from your inventory totals.
4. **Delete Damaged and Worn Out records** – if those records have been taken care of. A book distributed to a student should not be marked as "worn out". A worn out book should be on the shelf waiting to go back to the District so they can replace it.
5. **Lost and Partial Payments** should be addressed individually by student. These records should remain in your database until full payment has been received.
6. Before importing students for the next school - **Advance Student Grades**. This moves students up a grade level. If a student is held back, the import (append and refresh) will update the grade level. Why do this? Let's say the last grade level on your campus is 5<sup>th</sup>. When you import your students for next year you will be importing your "new" 5<sup>th</sup> grade students. The import does not, however; remove your last year's 5<sup>th</sup> grade students. Advancing your students a grade level will move all of your students in TIP

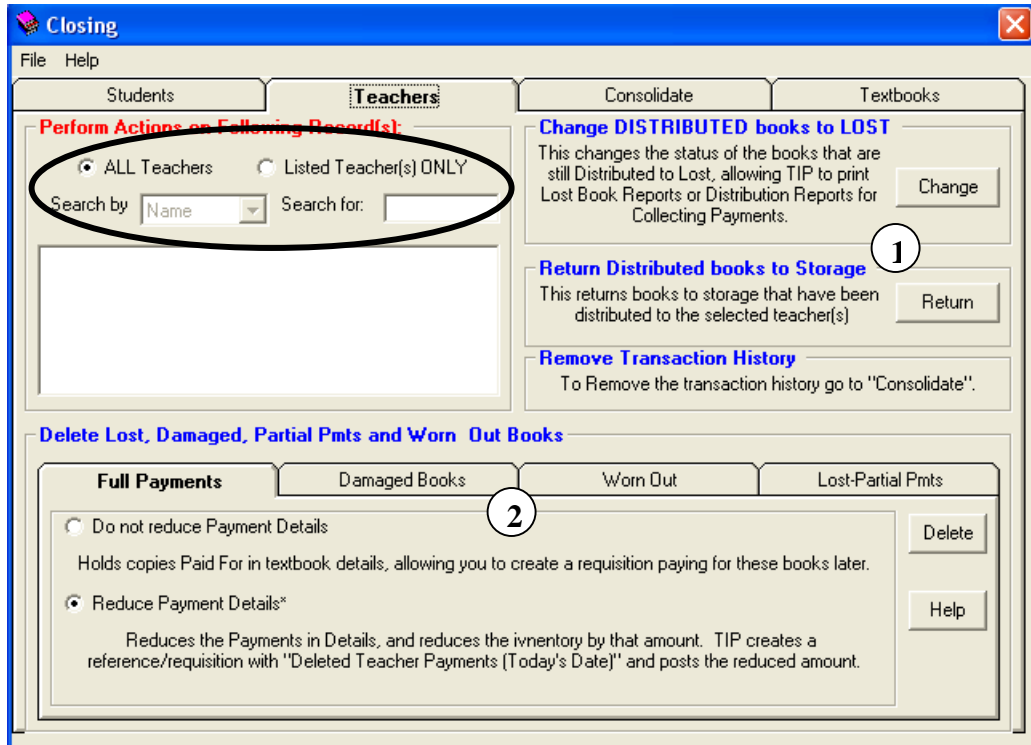
up one grade level. This allows you to continue to try to collect for losses from those students no longer on your campus.

7. You can also **Delete Students by Grade Level**. Be careful! Before you do this, you might want to print a lost book report for the grade level you think you want to delete. The report will let you know if you have any students that you still need to try to collect from. If you do, you might want to print the report and then delete or change the grade level from the student database for those students that you do not want to delete.

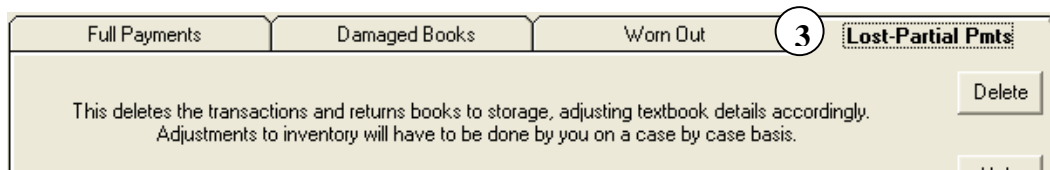
## Teachers Tab:

When working in the Teacher closing tab, remember that the transactions can be limited to a selected list of teachers or for all teachers.

1. Determine if distributed books should be changed to "lost" or returned to storage. This is done after collecting books from teachers. Keep in mind that returning distributed books to storage, returns ALL teacher distributions
2. Payments, Damaged, Worn-Out – If books have been re-assigned to any of these assignments – determine if payment has been made to the district. If books have been marked as "damaged" and/or "worn out" you may want to delete those records. As with students, a book in use by a teacher really should not be re-assigned to worn out.



3. **Lost-Partial Pmts-** Deleting lost books returns the book to storage. We do not recommend deleting lost books as these records represent money and/or books owed to you. If a student lost a book that the teacher distributed to him/her, the book should be transferred to the student and marked lost by the student. You should print a lost book letter to be mailed home to the parent.



## Consolidate

This removes returned teacher records so that they do not show up on distribution reports in the next year. The date to consolidate and the date to show on reports should be set to a date outside the last day of the completed school year and before textbooks are distributed for the next school year.

User Name	Accession	Code	ISBN	Date
Sample User	4792	R	590573934	9/11/1997
Sample User	N/A	T	590573934	9/11/1997
Sample User	3481	D	590573934	9/11/1997
Sample User	N/A	R	590573934	11/1/1997
Sample User	7020	R	590573934	12/10/1997
		↓		↓
Sample User	3481	D	590573934	New Date

All distributions to teachers, prior to the date you have entered, that are marked as being returned will be deleted. This does not affect student distributions.

Consolidate all transactions that occurred prior to:

Enter the date to use for consolidated transactions:

Buttons: Consolidate, Help

Progress:

## Textbooks

- Delete Expired Adoptions** – We really recommend that books be deleted from the Add, Edit Remove records tab as many times the State adjusts the expiration date on book and the State list will not match what is in TIP. This procedure deletes all books that appear in the list for the expiration year chosen.
- Zero Out Consumables** - simply removes transactions from the students/teachers. Any books in storage will remain in storage. Thus your consumable textbook inventory is lowered to match the in storage total.

**Delete Expired Textbooks**

List ALL books expiring on the following year:

ISBN	TITLE	GROUP CODE

If any book listed above should NOT be deleted, do not continue with this operation. Go to the "Add, Edit and Remove Records" screen and change the expiration date of that book before continuing.

**Zero Out Consumables**

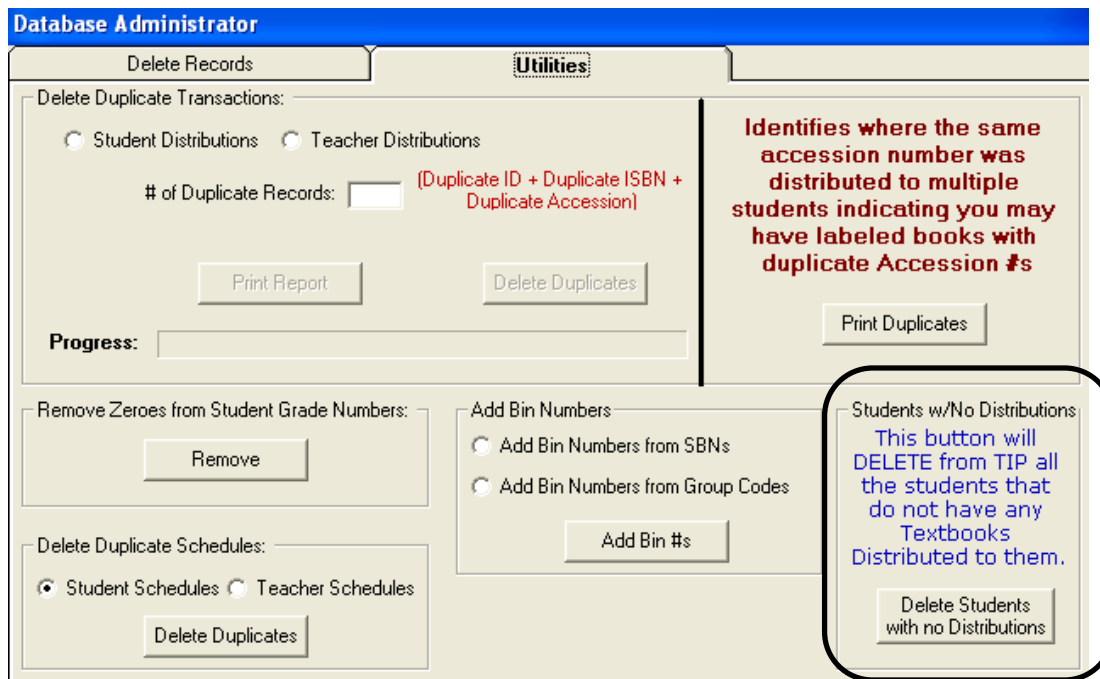
Delete ALL consumable books distributed prior to and including:

This will delete the distributions prior to the specified date and reduce the inventory by the same amount, leaving the remainder in storage.

This will print a report that lists all the 'Consumable' textbooks in your inventory.

To complete the year end process and clean up your student database records we suggest that you Delete Students with no Current Distributions. Start by selecting **Database** on the menu bar and then select **Database Administrator**. If you do not have a recent backup of your data, make one.

Select the **Utilities** tab and then select the **Delete Students with no Distributions** button. This should be done just before importing your students for the new school year.



You are now ready to **Import Data**. This should be done just prior to the beginning of the school year.

To import data, you need to first obtain the exported files from your student management system. The files should be in ASCII format. More information on the import formats can be found in TIPs Help system. From Utility on the menu bar, select Import Data. Click on the Help button in the bottom right hand corner of the screen. Once you have the import files you are ready to import. Each type of data is imported as a separate file.

From Utility on the menu bar, select **Import Data**. Select the Import Method and then select the type of data you are importing. You will be asked to specify the location of the import file. Each type of file will be imported individually.

