

Overview

Chancery SMS provides an automated method for completing Year-End Processing that verifies and completes each step in sequence. For more information about running the Year-End Processing automated process, see your Chancery SMS Next-Year Preparation and Year-End Processing Guide.

If you prefer to complete each step in the Year-End Processing process manually, this technical bulletin describes each step that must be completed.

IMPORTANT NOTE

This technical bulletin only addresses the Year-End Processing steps. It assumes that you have completed the Next-Year Preparation steps according your Next-Year Preparation and Year-End Processing Guide and that you have created a historical database shell and, if you are using address validation, that all geocodes are assigned correctly.

NOTE

When you use the manual Year-End Processing method, you must also back up your database manually.

Handling Custom Data

If you have custom data in your database and you want to tell Year-End Processing how to handle that custom data, modify the following stored procedures with the appropriate code:

- YEP_BEFORE_DATA_MOVE_DELETE_CUSTOM
- YEP_MOVE_CUSTOM_DATA
- YEP_DELETE_ACTIVE_DATA_CUSTOM

These stored procedures are updated when the following scripts are run:

- YEP_BEFORE_DATA_MOVE_DELETE
- YEP_MOVE_ACTIVE_DATA
- YEP_DELETE_ACTIVE_DATA

Manual Year-End Processing Steps

The following steps are required to complete Year-End Processing manually:

- Step 1: Ensure the Database is Ready for Year-End Processing. See page 3.
- Step 2: Clear the YEP Logs. See page 3.
- Step 3: Stop Chancery SMS Task Managers. See page 3.
- Step 4: Back Up Your Database. See page 3.
- Step 5: Lock the Database. See page 4.
- Step 6: Update Statistics. See page 4.
- Step 7: Back Up Your Active Calendar Database. See page 4.
- Step 8: Restore the Active Database Over the Historical Shell. See page 4.
- Step 9: Change the Database Owner to the Correct ID. See page 5.
- Step 10: Verify the Historical Database Reference. See page 6.
- Step 11: Update the Historical Flag. See page 6.
- Step 12: Update the Backup Flag. See page 6.
- Step 13: Disable Audit Logging. See page 6.
- Step 14: Create Elementary Historical Records. See page 7.
- Step 15: Back up your Database. See page 7.
- Step 16: Create Secondary Historical Records. See page 7.
- Step 17: Back up your Database. See page 7.
- Step 18: Create Secondary Permanent Records. See page 8.
- Step 19: Back up your Database. See page 8.
- Step 20: Update Next Year Students. See page 8.
- Step 21: Preserve Active Data. See page 8.
- Step 22: Back up your Database. See page 9.
- Step 23: Purge Win School and Mac School Data. See page 9.
- Step 24: Delete Active Data Before the Data Move. See page 9.
- Step 25: Move Active Data. See page 10.
- Step 26: Re-enroll Returning Students. See page 10.
- Step 27: Synchronize Student Enrollment. See page 10.
- Step 28: Delete Active Data After the Data Move. See page 10.
- Step 29: Roll Over the Calendar. See page 11.
- Step 30: Create Secondary Subject Assignments. See page 11.
- Step 31: Enable Audit Logging. See page 11.
- Step 32: Apply Planning Calendar Day Patterns to New Active Calendar. See page 11.
- Step 33: Improve Performance of CSL_SMS_USER_CALENDAR Table. See page 12.
- Step 34: Refresh Database Statistics. See page 12.
- Step 35: Unlock the Database. See page 12.
- Step 36: Start the Chancery SMS Task Managers. See page 13.

Step 1: Ensure the Database is Ready for Year-End Processing

Before you run Year-End Processing, it is critical that you complete the following steps according to the “District Performs Year-End Processing” section in your Next-Year Preparation and Year-End Processing Guide:

- 1 Prepare for Year-End Processing.
- 2 Create the historical database shell.
- 3 Stop Replication Manager (only districts using Win School or Mac School).
- 4 Perform Year-End Processing pre-check

In addition, if your district uses the Geocode method and address validation, make sure the geocodes are assigned correctly for all schools and students. For more information, see the Chancery SMS Checking Geocode Setup Technical Bulletin.

Step 2: Clear the YEP Logs

Before you run Year-End Processing, clear the existing events from the YEP logs.

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
EXEC YEP_RESET_EVENTS
```
- 4 Execute the script.

Step 3: Stop Chancery SMS Task Managers

Tasks cannot run while Year-End Processing is running. Before completing this step, make sure that all tasks are complete.

To prevent tasks from starting while Year-End Processing is running, stop all Chancery SMS task managers.

To stop the task managers:

- 1 On all Chancery SMS servers, from the Start menu, navigate to Programs > Administrative Tools > Services.
- 2 For each Chancery SMS service, right-click the Chancery SMS Task Manager service and select Stop.

Step 4: Back Up Your Database

Back up your Chancery SMS database before you continue with the following Year-End Processing steps.

Step 5: Lock the Database

Before you start Year-End Processing, you need to prevent users from accessing the database while Year-End Processing is running.

NOTE

When you run Year-End Processing manually, no tasks display on the YEP Log page.

To lock the database:

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
UPDATE CSL_ADM_DATABASE_INFO set YEP_IN_PROGRESS = 1, HISTORICAL_DATABASE = 0
```
- 4 Execute the script.

NOTE

To prevent Year-End Processing from running on any database backups, you can run the following script on each backup database: `UPDATE CSL_ADM_DATABASE_INFO set IS_BACKUP = 1`

Step 6: Update Statistics

To increase the effectiveness of the database page index and ensure Year-End Processing completes as quickly as possible, update statistics.

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
EXEC sp_updatestats  
dbcc updateusage (0)
```
- 4 Execute the script.

Step 7: Back Up Your Active Calendar Database

Back up your Chancery SMS database before you continue with the remaining Year-End Processing steps. The database backup will become the historical database.

NOTE

Ensure you perform a complete database backup, not a differential backup.

Step 8: Restore the Active Database Over the Historical Shell

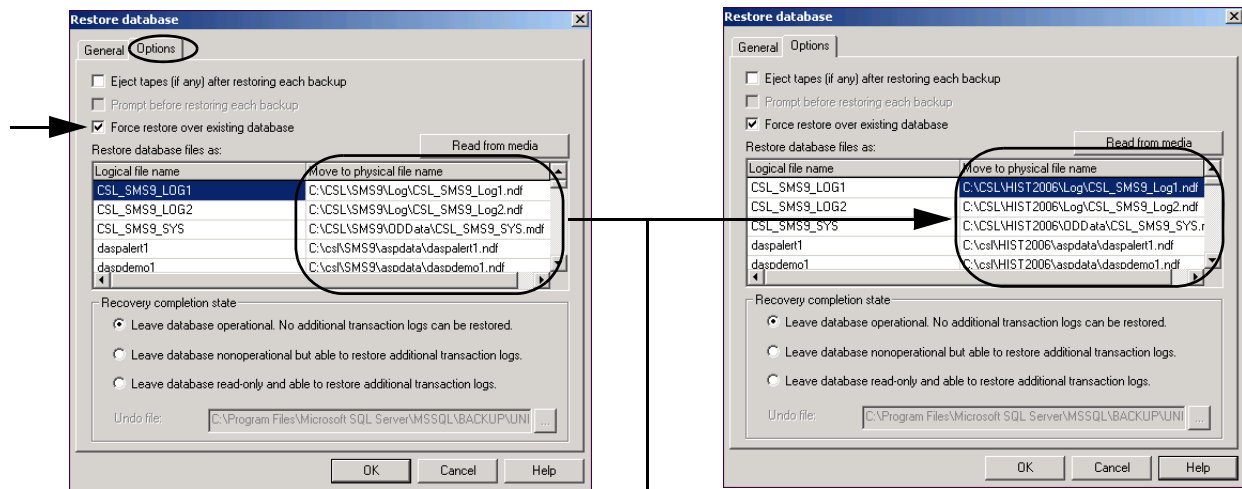
Restore the database backup over the historical database shell. Make sure the backup is restored to the correct location. For example, Enterprise Manager will restore the database files to the active database file path by default. If you are using Enterprise Manager to restore the backup, in the Restore Database dialog, you must manually change each database file path name to the historical database shell location.

To restore the database and change the file path name in Enterprise Manager:

- 1 In Enterprise Manager, navigate to the active database. Right-click the database and select All Tasks > Restore Database.
- 2 In the Restore Database dialog, set the Restore option to "From device".
- 3 Under Devices, click Select Devices.
- 4 Click Add and search for and select the database backup file you created in "Back Up Your Active Calendar Database" on page 4.
- 5 Click the Options tab.
- 6 Select "Force restore over existing database", and then, for every logical file name, specify the path to the historical database shell.

NOTE

The diagram below is from SQL 2000. If you use SQL 2005, the interface is slightly different.



By default, the "Move to physical file name" column specifies the path to the active database. You must change the path for every logical file name in the table to the path where the historical database shell is saved.

- 7 Click OK.

Step 9: Change the Database Owner to the Correct ID

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the historical database.
- 3 Enter the following script:

```
EXEC sp_changedbowner 'xxxx'
```

-- (where xxxx = db owner ID of the historical database shell)
- 4 Execute the script.

Step 10: Verify the Historical Database Reference

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
SELECT * from CSL_ADM_HISTORICAL_DB_INFO
```
- 4 Execute the script.
The script returns a list of historical databases created for this active database.
- 5 Verify that the newly created historical database is included in the list and that the database name and location is correct.

Step 11: Update the Historical Flag

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the Historical database.
- 3 Enter the following script:

```
UPDATE CSL_ADM_DATABASE_INFO set HISTORICAL_DATABASE = 1, YEP_IN_PROGRESS = 0
```
- 4 Execute the script.

Step 12: Update the Backup Flag

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
UPDATE CSL_ADM_DATABASE_INFO set IS_BACKUP = 0
```
- 4 Execute the script.

Step 13: Disable Audit Logging

To improve performance, disable auditing.

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
EXEC DISABLE_AUDIT_TRIGGERS
```
- 4 Execute the script.

Step 14: Create Elementary Historical Records

NOTE

Depending on the size of your database, this step may take a significant amount of time to complete. You can track the progress through the CSL_YEP_DEBUG_LOG_ELEM table. In addition, it is common for there to be data inconsistencies during this step and Year-End Processing may stop. If this occurs, correct the problem data, restore the database from the most current backup, and retry.

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
EXEC YEP_ELEM_CREATE_STD_HIST_RECS
```
- 4 Execute the script.

Step 15: Back up your Database

We recommend you back up your Chancery SMS database before you continue with the remaining Year-End Processing steps.

Step 16: Create Secondary Historical Records

NOTE

Depending on the size of your database, this step may take a significant amount of time to complete. You can track the progress through the CSL_YEP_DEBUG_LOG table. In addition, it is common for there to be data inconsistencies during this step and Year-End Processing may stop. If this occurs, correct the problem data, restore the database from the most current backup, and retry.

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
EXEC YEP_CREATE_STD_HIST_RECORDS
```
- 4 Execute the script.

Step 17: Back up your Database

Before you continue with the remaining Year-End Processing steps, back up your Chancery SMS database.

Step 18: Create Secondary Permanent Records

NOTE

Depending on the size of your database, this step may take a significant amount of time to complete. You can track the progress through the CSL_PR_PROCESS_LOG table. In addition, it is common for there to be data inconsistencies during this step and Year-End Processing may stop. If this occurs, correct the problem data, restore the database from the most current backup, and retry.

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
EXEC PR_CREATE_ACTIVE_PERMANENT_RECORDS
```
- 4 Execute the script.

Step 19: Back up your Database

Before you continue with the remaining Year-End Processing steps, back up your Chancery SMS database.

Step 20: Update Next Year Students

To ensure student records and projections are up to date and based on the correct map, update student records. If errors occur, view CSL_NYP_ENROLLMENT_LOG.

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
EXEC UPDATE_NEXT_YEAR_STUDENTS 1
```
- 4 Execute the script.

Step 21: Preserve Active Data

NOTE

Depending on the size of your database, this step may take a significant amount of time to complete. In addition, it is common for there to be data inconsistencies during this step and Year-End Processing may stop. If this occurs, correct the problem data, restore the database from the most current backup, and retry.

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
EXEC YEP_POPULATE_ACTIVE_HIST_TBLS
```
- 4 Execute the script.

Step 22: Back up your Database

Before you continue with the remaining Year-End Processing steps, back up your Chancery SMS database.

Step 23: Purge Win School and Mac School Data

This step applies only to districts using Win School or Mac School.

Since in the Chancery SMS database, Win School and Mac School data is specific to the school year, you must remove the previous year's data to create a clean placeholder for the Win School and Mac School schools. When you reintegrate the schools with Chancery SMS the Win School and Mac School data for the new school year will be copied to Chancery SMS.

To purge Win School and Mac School data:

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
EXEC YEP_PURGE_SCHOOLS
```
- 4 Execute the script.

Step 24: Delete Active Data Before the Data Move

Before moving data from the planning calendar to the new active calendar, run the following scripts to delete existing data that is no longer current from the active calendar.

NOTE

If data inconsistencies prevent data from being deleted, you must correct the problem data, restore the database from the most current backup, and retry.

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 **Tennessee customers only**, enter the following script:

```
EXEC YEP_RESET_DATA_TN
```
- 4 Execute the script.
- 5 All customers, enter the following script:

```
EXEC YEP_BEFORE_DATA_MOVE_DELETE
```
- 6 Execute the script.

Step 25: Move Active Data

Once outdated information is removed from the active database, you can move the planning calendar to the active calendar.

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
EXEC YEP_MOVE_ACTIVE_DATA
```
- 4 Execute the script.

Step 26: Re-enroll Returning Students

Optionally, back up your Chancery SMS database to create a restore point. Skip this step if your district does not withdraw and re-enroll returning students during YEP. Note that if your District Preferences (District Setup > Preferences) are set to *not* create withdrawal and re-enrollment records for returning students, the script below will not process any data when you execute it.

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
EXEC YEP_CREATE_REENROLL_RETURN_STUDENT
```
- 4 Execute the script.

Step 27: Synchronize Student Enrollment

Optionally, back up your Chancery SMS database to create a restore point.

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
EXEC YEP_SYNC_STUDENT_ENROLLMENT
```
- 4 Execute the script.

Step 28: Delete Active Data After the Data Move

Once the planning calendar data is moved to the new active calendar, delete the data from the previous active calendar data.

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
EXEC YEP_DELETE_ACTIVE_DATA
```
- 4 Execute the script.

Step 29: Roll Over the Calendar

Archive the old active calendar and update the planning calendar to be the active calendar.

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
EXEC YEP_ROLLOVER_CALENDAR
```
- 4 Execute the script.

Step 30: Create Secondary Subject Assignments

The school calendars are ready for use. Create the secondary subject assignments on the new active calendar.

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
EXEC YEP_CREATE_SUBJECT_ASSIGNMENTS
```
- 4 Execute the script.

Step 31: Enable Audit Logging

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
EXEC ENABLE_AUDIT_TRIGGERS
```
- 4 Execute the script.

Step 32: Apply Planning Calendar Day Patterns to New Active Calendar

Assign the day patterns from the planning calendar to the new active calendar.

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
EXEC YEP_APPLY_DAY_PATTERNS
```
- 4 Execute the script.

Step 33: Improve Performance of CSL_SMS_USER_CALENDAR Table

The steps for improving performance of this table are different depending on whether you are in a replicated environment.

To improve performance of the CSL_SMS_USER_CALENDAR table:

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following scripts:

```
EXEC REPLICATION_DROP_ARTICLE CSL_SMS_USER_CALENDAR
--Comment this line out if you are not using replication

TRUNCATE TABLE CSL_SMS_USER_CALENDAR
--All environments use this line

EXEC REPLICATION_ADD_ARTICLE_TO_PUB_SUB CSL_SMS_USER_CALENDAR
--Comment this line out if you are not using replication.

DBCC CHECKIDENT (CSL_SMS_USER_CALENDAR, RESEED, 5000)
--All environments use this line
```
- 4 Execute the script.

Step 34: Refresh Database Statistics

After Year-End Processing completes, refresh statistics.

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the active database.
- 3 Enter the following script:

```
EXEC sp_updatestats
```
- 4 Execute the script.

Step 35: Unlock the Database

Your database is now ready to use. Unlock the database.

- 1 From the Start menu, navigate to All Programs > Microsoft SQL Server > SQL Server Management Studio.
- 2 Connect to the database.
- 3 To generate a list of active tasks, enter the following script:

```
Update CSL_ADM_DATABASE_INFO set YEP_IN_PROGRESS = 0, IS_BACKUP = 0,
HISTORICAL_DATABASE = 0, YEP_IS_MANUAL_BACKUP = 0
```
- 4 Execute the script.

Step 36: Start the Chancery SMS Task Managers

After Year-End Processing is complete, you can restart the Chancery SMS task managers.

- 1 On your Chancery SMS server, from the Start menu, navigate to Programs > Administrative Tools > Services.
- 2 For each Chancery SMS service, right-click the Chancery SMS Task Manager service and select Start.

Quick Reference

You can use the following script as a quick way to enter the scripts in SQL Server Management Studio.

- 1 Copy the script to the clipboard.
- 2 Paste the script into SQL Server Management Studio.
- 3 Execute the scripts one command at a time.

Script

```
-- Before you begin Year-End Processing, make sure the database is ready for YEP
-- Clear the YEP logs
EXEC YEP_RESET_EVENTS
-- Stop all Chancery SMS task managers
-- Back up your database
-- Lock the database
UPDATE CSL_ADM_DATABASE_INFO set YEP_IN_PROGRESS = 1, HISTORICAL_DATABASE = 0
-- Update statistics
EXEC sp_updatestats
dbcc updateusage (0)
-- Back up your active calendar database
-- Restore the active database over the historical shell
-- Change the database owner to the correct ID
EXEC sp_changedbowner 'xxxx'
-- (where xxxx = db owner ID of the historical database shell)
-- Verify the historical database reference
SELECT * from CSL_ADM_HISTORICAL_DB_INFO
-- Update the historical flag
UPDATE CSL_ADM_DATABASE_INFO set HISTORICAL_DATABASE = 1, YEP_IN_PROGRESS = 0
-- Update the backup flag
UPDATE CSL_ADM_DATABASE_INFO set IS_BACKUP = 0
-- Disable audit logging
EXEC DISABLE_AUDIT_TRIGGERS
-- Create the elementary historical records
EXEC YEP_ELEM_CREATE_STD_HIST_RECS
-- Back up your database
-- Create the secondary historical records
```

```

EXEC YEP_CREATE_STD_HIST_RECORDS
-- Create the secondary permanent records
EXEC PR_CREATE_ACTIVE_PERMANENT_RECORDS
-- Back up your database
-- Update next year student records
EXEC UPDATE_NEXT_YEAR_STUDENTS 1
-- Preserve active data
EXEC YEP_POPULATE_ACTIVE_HIST_TBLS
-- Backup your database
-- Purge Win School and Mac School data (districts using Win School or Mac School only)
EXEC YEP_PURGE_SCHOOLS
-- Delete active data before moving the calendar. TN only:
EXEC YEP_RESET_DATA_TN
-- All databases
EXEC YEP_BEFORE_DATA_MOVE_DELETE
-- Move active data
EXEC YEP_MOVE_ACTIVE_DATA
-- Re-enroll returning students
EXEC YEP_CREATE_REENROLL_RETURN_STUDENT
-- Synchronize student enrollment
EXEC YEP_SYNC_STUDENT_ENROLLMENT
-- Delete active data after the data move
EXEC YEP_DELETE_ACTIVE_DATA
-- Roll over the calendar
EXEC YEP_ROLLOVER_CALENDAR
-- Create secondary subject assignments
EXEC YEP_CREATE_SUBJECT_ASSIGNMENTS
-- Enable audit logging
EXEC ENABLE_AUDIT_TRIGGERS
-- Apply default day patterns
EXEC YEP_APPLY_DAY_PATTERNS
-- Improve performance of CSL_SMS_USER_CALENDAR_TABLE
EXEC REPLICATION_DROP_ARTICLE CSL_SMS_USER_CALENDAR
--Comment this line out if you are not using replication
TRUNCATE TABLE CSL_SMS_USER_CALENDAR
--All environments use this line
EXEC REPLICATION_ADD_ARTICLE_TO_PUB_SUB CSL_SMS_USER_CALENDAR
--Comment this line out if you are not using replication
DBCC CHECKIDENT (CSL_SMS_USER_CALENDAR, RESEED, 5000)
--All environments use this line
-- Refresh the database statistics
EXEC sp_updatestats
-- Unlock the database

```

```
UPDATE CSL_ADM_DATABASE_INFO set YEP_IN_PROGRESS = 0, IS_BACKUP = 0,  
HISTORICAL_DATABASE = 0, YEP_IS_MANUAL_BACKUP = 0  
-- Start Chancery SMS task managers
```