

Archiving Overview

Overview

Archiving students is a process that is best carried out on a regular annual cycle and we recommend mid-year as a good time to do so. This keeps archiving away from the year-end, which is a busy time.

The purpose of archiving is to move student, enrolment and outcome records from what we call the “live” database to the “archive” database. Doing so keeps the live database smaller and less cluttered with students who have long since left the building.

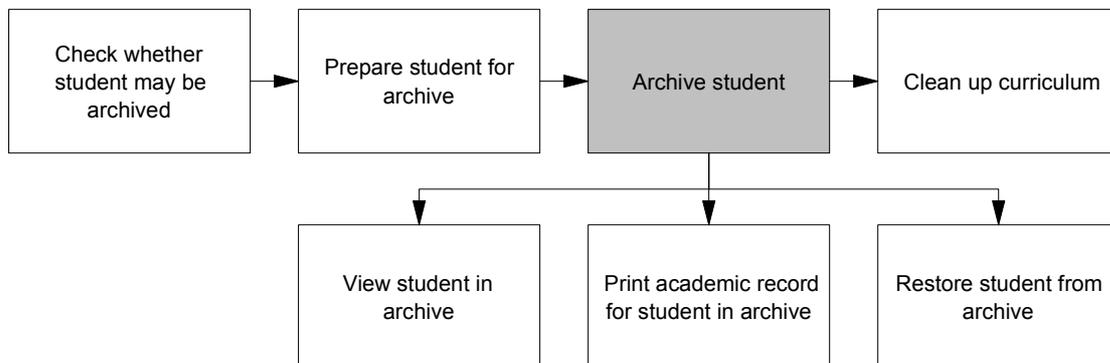
You need to archive records, rather than delete them, for one very good reason: TEC requires you to retain enrolment records for 7 years and academic records permanently (see section 5.5.3 of the Tertiary Funding Guide).

What this means is that the archiving process, in addition to retaining sufficient information about a student that they can be identified, enrolment dates, and outcome information, must also retain curriculum information so that enrolments and outcome records make sense.

In practice, what Take2 does by archiving, is physically move student, enrolment and outcome data from the live database to the archive database, whilst leaving curriculum data permanently in the live database but in a state where it can be “retired” and, therefore, hidden from view in the normal course of events. Before a student can be archived certain checks are first performed and, where appropriate, the student’s record is slightly modified.

Once a student is archived in Take2 it is possible to view that student, print out their academic record and, if necessary, bring the student back from archive to the live database. You might need to do this if, for example, a student studied a certificate programme with you five years ago. You archived them three years ago, not expecting them to return but, this year, they turned up wanting to enrol on a diploma programme.

So, an overview, the full set of archiving tasks is as follows:



Students who can be archived

Not every student can be archived; only those who meet the following criteria:

- The student must be marked as “inactive” on the *Students* or *Persons* form – i.e. the *Active* field is not ticked.
- The student must not be marked as a prospect.

Persons

Select Prospect | Advanced Search | Selected Person: Khan, Graeme | 133 | Close

Basic Details | Contacts | Extras | Standard Bring-Ups

Add | Cancel | Save | Edit | Delete | ← | → | Print | Student View | [Red Arrow]

Family Name: Initials: Caregiver: Tutor: Student: Prospect:

First Names: Title:

Preferred: Previous:

Organisation:

Manager: Update Contact Details

Job Title:

Branch: Notes: [Red Arrow]

Active Address: Copy

Show Address: Home Second Third

Home Address

Post Code:

Phone:

Fax:

Home Mobile:

Email:

Double click to open email editor

Record Updated: Active: Record Created:

The student must have at least one enrolment event and the student must have no enrolment events for which the Fee Paid field is not ticked. If a student has not been enrolled, they cannot be archived but, then, nor would you want to archive them because there is no requirement to do so. You would just delete the record if you did not need it.

Enrolment Details

Select Student | Name: Khan, Graeme | ID: 133 | Close

Student Details | Student Outcomes

Select By: Name ID NSN

NSN:

NDSWY1&Y2: National Diploma in Social Work Year 1 & 2 2004
 Event 174 NDSWY1&Y2-05 31/01/2004 - 12/12/2004
 Courses

Enrolment | Enrolment Event

Ad Hoc | Pattern | Edit | Cancel | Save | Delete | Print | Close

ID: EFTS: Status:

Start Date: Log ID: Class:

Finish Date: Re-Assign: W/D Date:

Updated: Withdraw: W/D Reason:

First Year:

Basic Fee Details

Invoice Number: Fee Paid:

Invoice Date: Fee Refunded:

Fee Amount: Fee Indicator 1:

Deduct Date: Fee Indicator 2:

Deduct Amount: Fee Indicator 3:

Who Pays:

W/D Fees Log: Invoice | Fee Log ID:

Show: Print Details All Events Selected Event | Fees Details

Notes:

Sort by: Unit Standard Code Title Parent/Child

To ensure that a student is not archived before all reporting requirements to the Ministry of Education/TEC are met, a student cannot be archived unless the year of the student's last course enrolment finish date is not less than two years prior to the year in which the archiving is done. For example, a student whose last course enrolment finish date is in 2004 cannot be archived until 2006.

The student must have no enrolments into Unit Standards that are marked as complete but which do not have a status of "N" – i.e. sent to NZQA.

Single Student Outcome

Selected Student Name: Close

Selected Student ID:

[Enrolment Details](#)

Qualification **Course** Component Foundation Certificate

Select Qualification: NZQA Login Assign to Parent from Child Outcomes

Course:

Extract Date: 30 April 31 August 31 December Return Year: Map CC

Course Completions: Display Hide

Code	Complete	CC	Date	Assessed	Status	Extension	TEC
UN7917.4-05	<input checked="" type="checkbox"/>	2	28/11/2005	<input checked="" type="checkbox"/>	N		<input type="checkbox"/>
UN7919.4-05	<input checked="" type="checkbox"/>	2	28/11/2005	<input checked="" type="checkbox"/>	N		<input type="checkbox"/>
UN7928.4-05	<input checked="" type="checkbox"/>	2	28/11/2005	<input checked="" type="checkbox"/>	N		<input type="checkbox"/>
UN7932.42005	<input checked="" type="checkbox"/>	2	24/08/2005	<input checked="" type="checkbox"/>	N		<input type="checkbox"/>
UN7934.42005	<input checked="" type="checkbox"/>	2	28/11/2005	<input checked="" type="checkbox"/>	N		<input type="checkbox"/>
UN7937.42005	<input checked="" type="checkbox"/>	2	28/11/2005	<input checked="" type="checkbox"/>	N		<input type="checkbox"/>
UN7942.42005	<input checked="" type="checkbox"/>	2	24/08/2005	<input checked="" type="checkbox"/>	N		<input type="checkbox"/>
UN7944.4-05	<input checked="" type="checkbox"/>	2	26/10/2005	<input checked="" type="checkbox"/>	N		<input type="checkbox"/>
UN7948.4-05	<input checked="" type="checkbox"/>	2	28/11/2005	<input checked="" type="checkbox"/>	N		<input type="checkbox"/>
UN7950.42005	<input checked="" type="checkbox"/>	2	24/08/2005	<input checked="" type="checkbox"/>	N		<input type="checkbox"/>
UN7955.42005	<input checked="" type="checkbox"/>	2	28/11/2005	<input checked="" type="checkbox"/>	N		<input type="checkbox"/>
UN7958.42005	<input checked="" type="checkbox"/>	2	28/11/2005	<input checked="" type="checkbox"/>	N		<input type="checkbox"/>
UN7959.42005	<input checked="" type="checkbox"/>	2	28/11/2005	<input checked="" type="checkbox"/>	N		<input type="checkbox"/>
UN7962.42005	<input checked="" type="checkbox"/>	2	28/11/2005	<input checked="" type="checkbox"/>	N		<input type="checkbox"/>
UN7970.42005	<input checked="" type="checkbox"/>	2	28/11/2005	<input checked="" type="checkbox"/>	N		<input type="checkbox"/>
UN7972.4-05	<input checked="" type="checkbox"/>	2	28/11/2005	<input checked="" type="checkbox"/>	N		<input type="checkbox"/>

Record: of 50

Sort Order: NZQA Level + Unit + Code Unit Code Name Parent/Child

You can make sure that individual students are ready for archiving on the various screens shown above and, indeed, many of these things should be sorted out in the normal processes of dealing with a student. However, as you will learn below, Take2 does provide a mechanism to sort out these data items quickly and easily as you use the archiving mechanism.