

How to manually Add, Archive and Merge a student in CPOMS

How to manually add a student

An **Admin Key Holder** in school can manually add additional students to CPOMS in the following way:-

- 1. Navigate to the CPOMS **'Admin'** area, and select the **'Add Student'** tab.
- 2. Complete all of the fields in the **'Student Details'** form (*Forename, Surname, Date of Birth, Sex and Groups*).



*If there isn't a Group which is applicable for the student, you can create a new one manually via the CPOMS **'Admin'** area > **'Groups'** tab, by selecting the **'New Group'** button, i.e. for Pre-admissions for example.*

- 3. Click **'Add student'**.

(Screenshot below)

How to archive a manually added student – Individually

Key Holders in a user group with the permission 'Edit student information' selected can archive a manually added student in CPOMS, as follows:-

- ③ Simply locate the student's profile you would like to archive, via the 'Quick student search' available at the main dashboard, or by clicking through their class list.
- ③ In the student's 'Overview' tab, click the **'Edit information'** button (to the right-hand side of the screen).

James Edwards (Reception)

Overview Incidents Contact Details Document Vault Attendance Student Report Audit Report Monitoring History

Overview  Edit information

Sex	Male	Gender Identity
Date of Arrival		Admission Date

- ③ Scroll down the page to the 'Archive' section and amend the **'Archived?'** drop down option from 'No' to **'Yes'**.

Archive

Archived? No

Links No

Yes

- ③ Scroll down the page again and click **'Update Student'**.

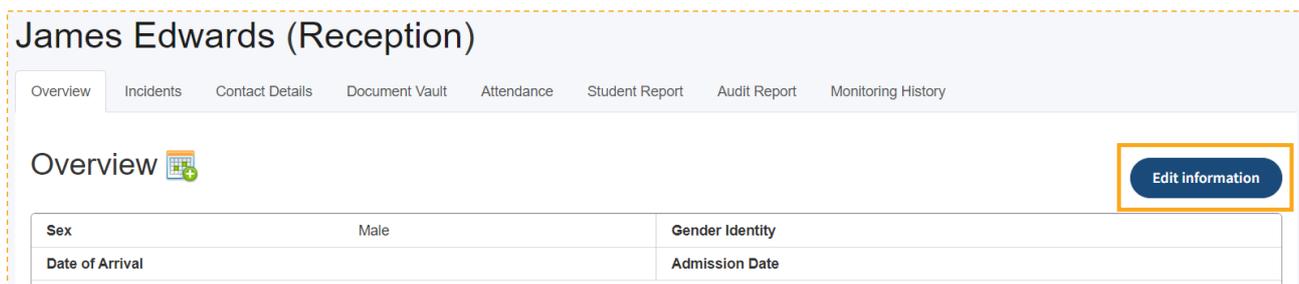


The student's profile will then become archived. Should you need to access it in the future, simply tick the **'Include archived students'** tick box, when using the 'Quick Student Search'.

How to **merge** a manually added students profile

In order to merge a manually added student's profile, you must firstly archive the duplicate one. Key Holders in a user group with the permission 'Edit student information' selected, can archive a manually added student in CPOMS, as follows:-

- ③ Simply locate the student's profile you would like to archive, via the 'Quick student search' available at the main dashboard, or by clicking through their class list.
- ③ In the student's 'Overview' tab, click the '**Edit information**' button (to the right-hand side of the screen).



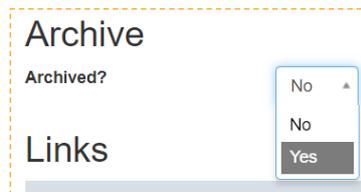
James Edwards (Reception)

Overview Incidents Contact Details Document Vault Attendance Student Report Audit Report Monitoring History

Overview  Edit information

Sex	Male	Gender Identity	
Date of Arrival		Admission Date	

- ③ Scroll down the page to the 'Archive' section and amend the '**Archived?**' drop down option from 'No' to '**Yes**'.

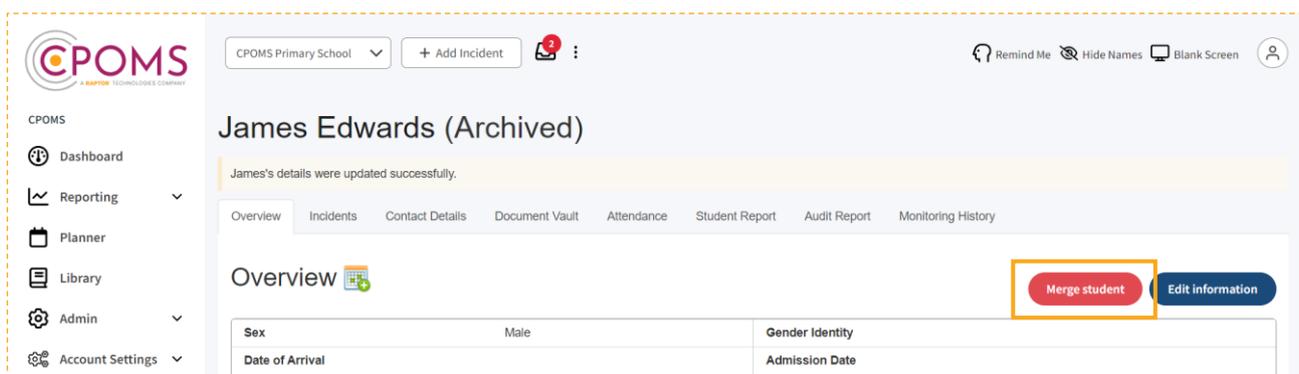


Archive

Archived? No
No
Yes

Links

- ③ Scroll down the page again and click '**Update Student**'.
- ③ Once the duplicate profile is archived, an additional button to '**Merge student**' will appear to the right-hand side of the student's 'Overview' tab (Now next to the 'Edit Information' button).



CPOMS Primary School + Add Incident 

Remind Me Hide Names Blank Screen 

CPOMS

Dashboard Reporting Planner Library Admin Account Settings

James Edwards (Archived)

James's details were updated successfully.

Overview Incidents Contact Details Document Vault Attendance Student Report Audit Report Monitoring History

Overview  Merge student Edit information

Sex	Male	Gender Identity	
Date of Arrival		Admission Date	

- ③ Click the '**Merge student**' button.
- ③ A pop up will then appear. Type in the name of the student you would like to merge with, and select their name when it appears.
- ③ When you are happy to, click '**Merge**'.

Merge student ✕

Warning: Merging students means copying all the recorded information from this student record to another student record and deleting this one.
It cannot be undone, so please ensure that you know what you are doing and that you select the correct student below.

Merge with

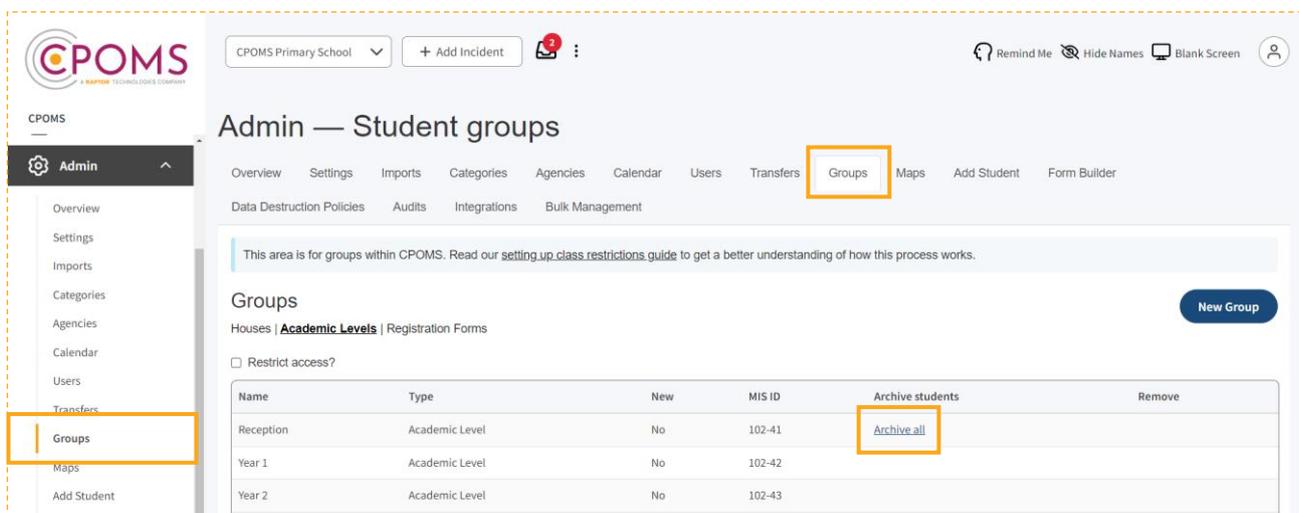
Cancel
Merge

Please note, the merging of profiles is **irreversible** so should only be selected if you are 100% sure.

How to archive a group of manually added students

An Admin Key Holder in school can archive a whole 'Group' of manually added students in the following way:-

- 🕒 Navigate to the CPOMS 'Admin' area, and select the 'Groups' tab.
- 🕒 If the group and students were added manually to CPOMS only, there will be an 'Archive all' option available, under the title 'Archive students'.



The screenshot shows the CPOMS Admin interface for 'Student groups'. The 'Groups' tab is highlighted in the top navigation bar. Below the navigation, there is a table of groups. The 'Archive students' column for the 'Reception' group has an 'Archive all' button highlighted with a red box.

Name	Type	New	MIS ID	Archive students	Remove
Reception	Academic Level	No	102-41	Archive all	
Year 1	Academic Level	No	102-42		
Year 2	Academic Level	No	102-43		

- 🕒 Click on the 'Archive all' option, on the relevant groups row.
- 🕒 A pop up will then appear for you to confirm that you would like to archive all students in the chosen group, click 'OK' now if you wish to continue.

All students in the chosen group will then become archived.



Students imported into CPOMS from your MIS (*i.e. SIMS, Integris, Arbor, for example*) will become archived automatically when their leave date is reached. You will not have the option to 'Archive' them in CPOMS.

For further assistance on any of the above please do not hesitate to contact us on
01756 797766 or support@cpoms.co.uk.

