Utah STATE OFFICE of Education

SIS+ 2000

New Year Initialization

February, 2011

Table of Contents

BASIC STEPS OF NEW YEAR INITIALIZATION 3
CREATE NEW TRACK 3
PROMOTE FACULTY AND STUDENTS TO THE FUTURE TRACK 6
CREATE COURSES FOR THE FUTURE TRACK 8
SET UP THE MASTER SCHEDULE FOR THE FUTURE TRACK 11
SPECIAL NOTE FOR CHARTER SCHOOLS 14
REVIEW 14

You can begin the New Year Initialization well before the end of the old year. In this tutorial, you will see the steps to follow to establish the new track, calendar, and schedule in advance.

Everything you need to do will be done in FoxPro (the client side of SIS), not the Web side of SIS.

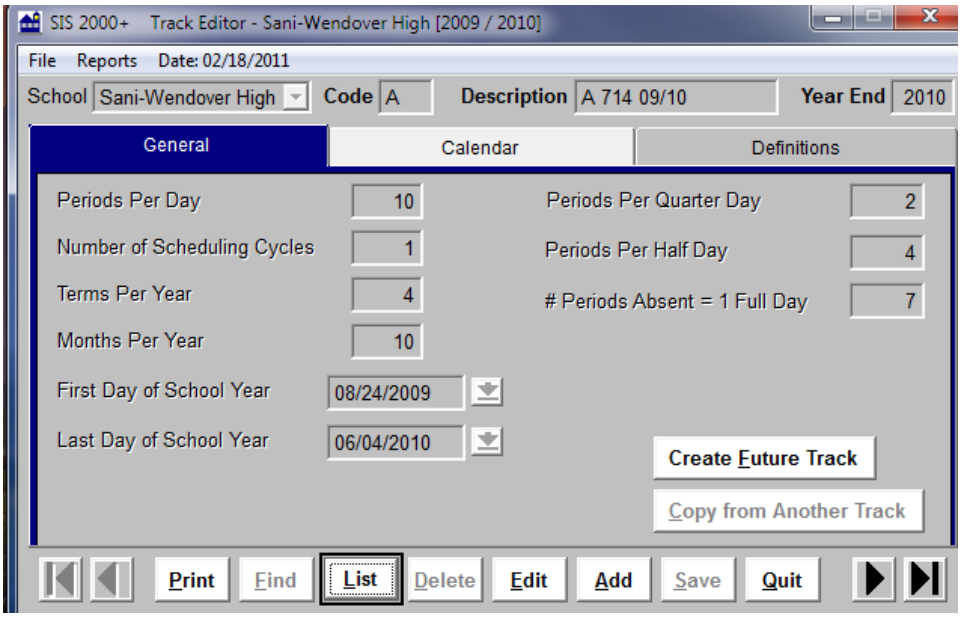
Basic Steps of New Year Initialization

1. Create new track.
2. Promote faculty and students to the future track.
3. Create courses for the future track.
4. Set up the Master Schedule for the future track.

Create New Track

The first step in the New Year Initialization process is to establish a new track for the next school year.

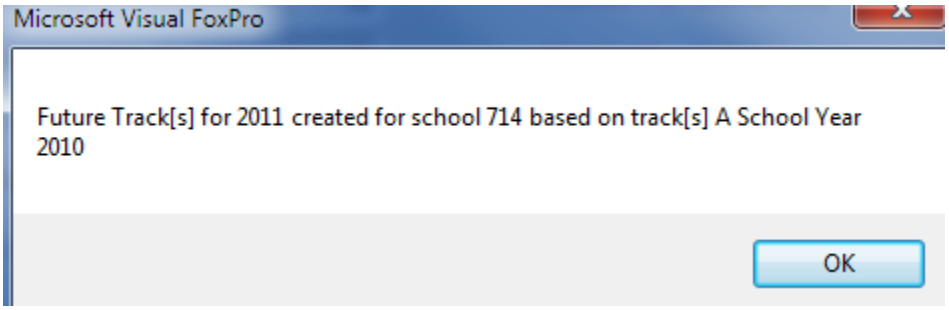
Go to the Main Menu > System > Track Editor.



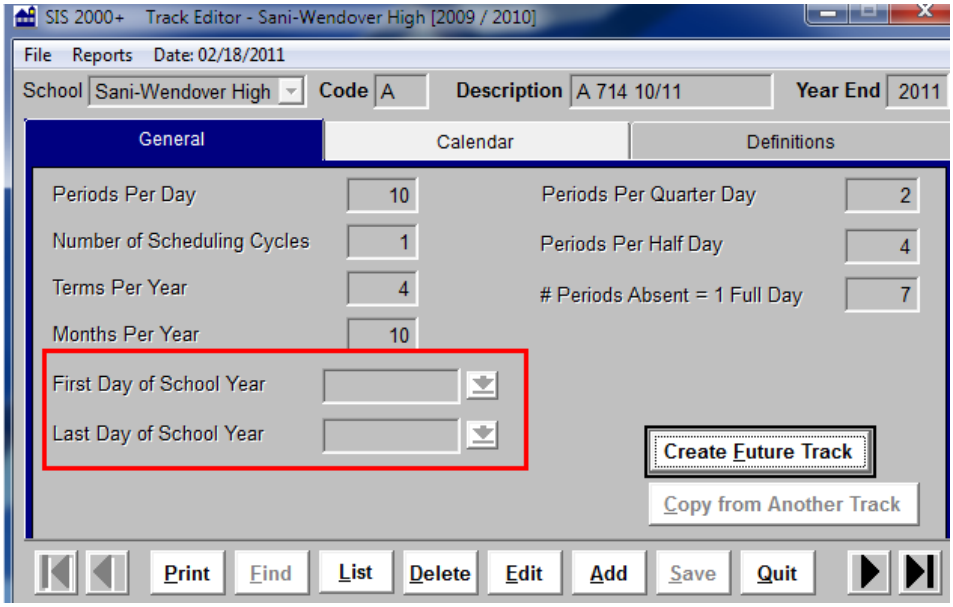
The image shown above is for the current track. We need to create a track for the next school year. The simplest way to create a future track is to copy the current track you're in. This is a good option if your basic track definitions (e.g. Periods Per Day, Number of Scheduling Cycles, and Terms Per Year) are remaining the same in the new track.

To copy this year's track, press **Create Future Track**.

You'll get a message telling you that a future track was created based on the current year's track, as shown below.



Press OK. Then you'll see the new track.

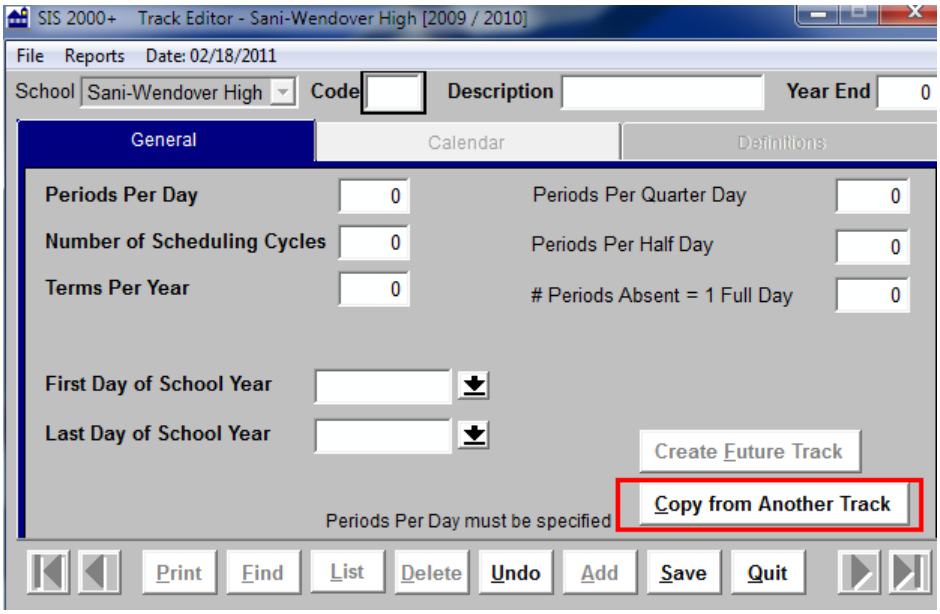


You'll need to press **Edit** and enter the first and last days of school. Notice that the system automatically created a new Description and Year End for the future track.

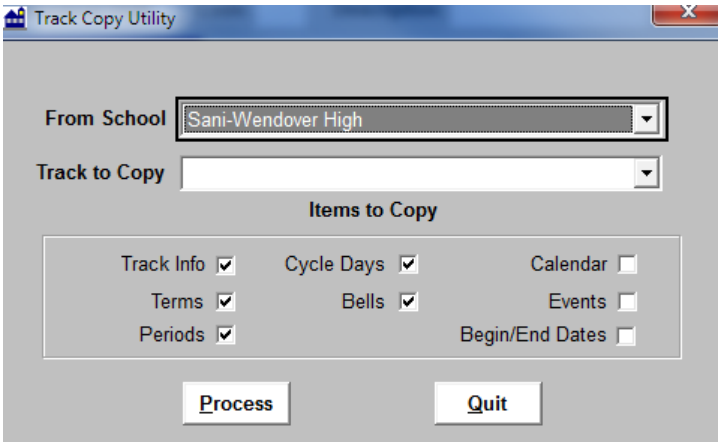
When you're done entering data in this screen, press **Save**.

In some cases, you may not want to copy the track from the current year, but instead you may want to copy a track from a different school in your district, or a different track for your school.

If that is the case, rather than pressing "Create Future Track" you would press **Add**.



Now the "Copy from Another Track" button is available. Press that button.

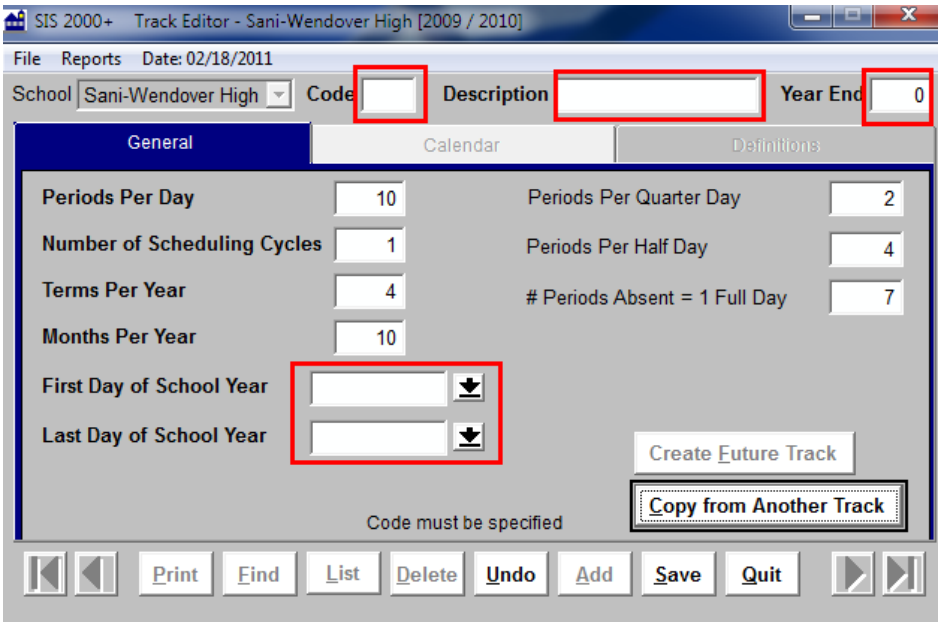


Use the drop-down to choose which school you'd like to copy. Charters will only see their own school. Then choose the track you'd like to copy from the **Track to Copy** drop-down.

Checkmark the boxes next to the items you would like to copy.

Press **Process**.

Once the processing is done, the following screen will display.



Enter a Code, Description, Year End year, and First and Last days of school. Verify that all of the other fields have correct data and press **Save**.

Once you've created the new track, you can set up the entire calendar, or you can wait. But the calendar must be set up before you can schedule students.

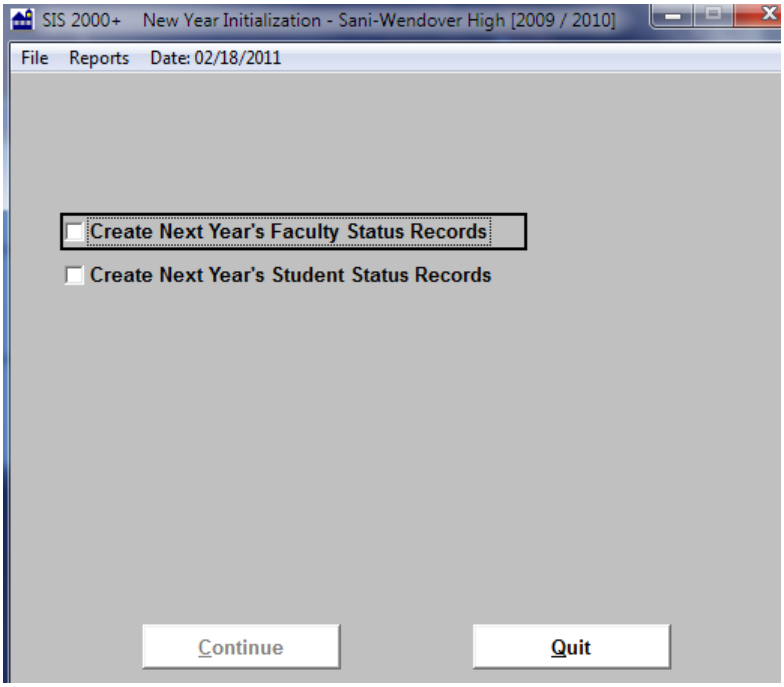
Instructions for setting up the calendar is beyond the scope of this tutorial. Instructions are found in other documentation.

Promote Faculty and Students to the Future Track

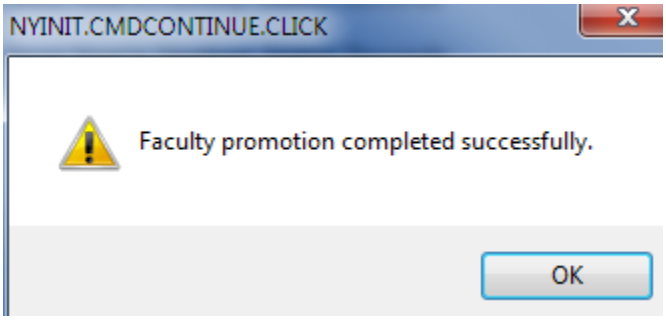
If you want to schedule for the New Year, you must have teachers and students in the new track. That means they must have a future status record in the new track.

Usually, you create the future status for both the faculty and the students at the same time, but you don't have to. Let's look at where this is done.

Go to System > New Year Menu > Future Status.

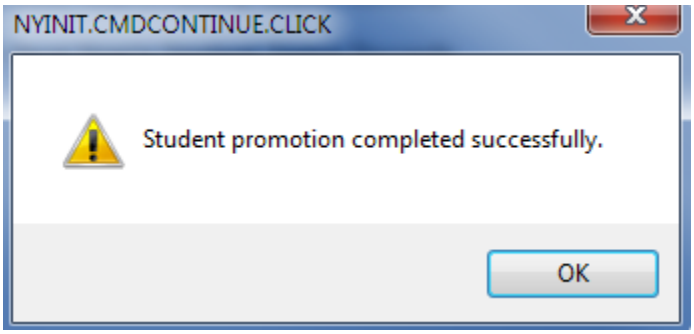


This is a simple screen. Check one or both boxes and press Continue. You'll get a message like the one displayed below.



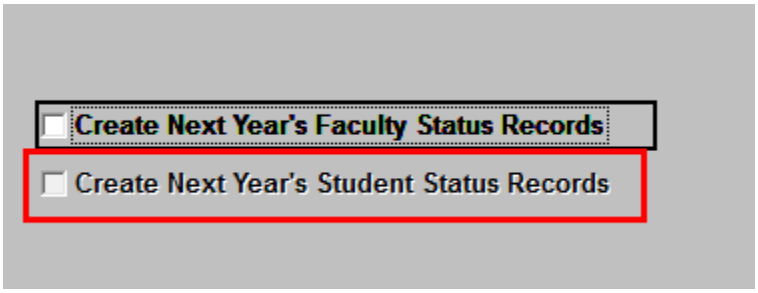
Press OK.

Then you'll get a message like the one displayed below.



Press OK.

Notice that after you do this, the button for "Create Next Year's Student Status Records" is greyed out.

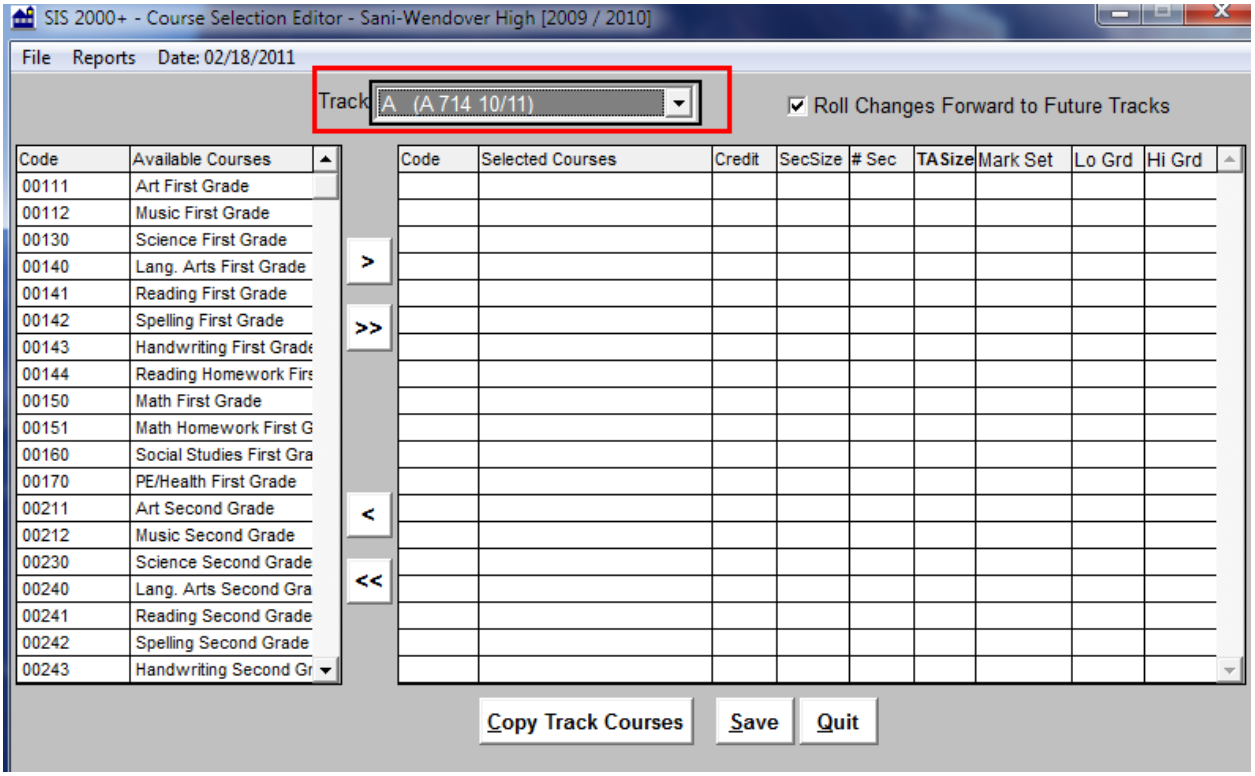


When the year-end process is actually run, each student and faculty member will automatically be promoted to the next year and will become active in that track.

Create Courses for the Future Track

Next, you need to create courses in the new track.

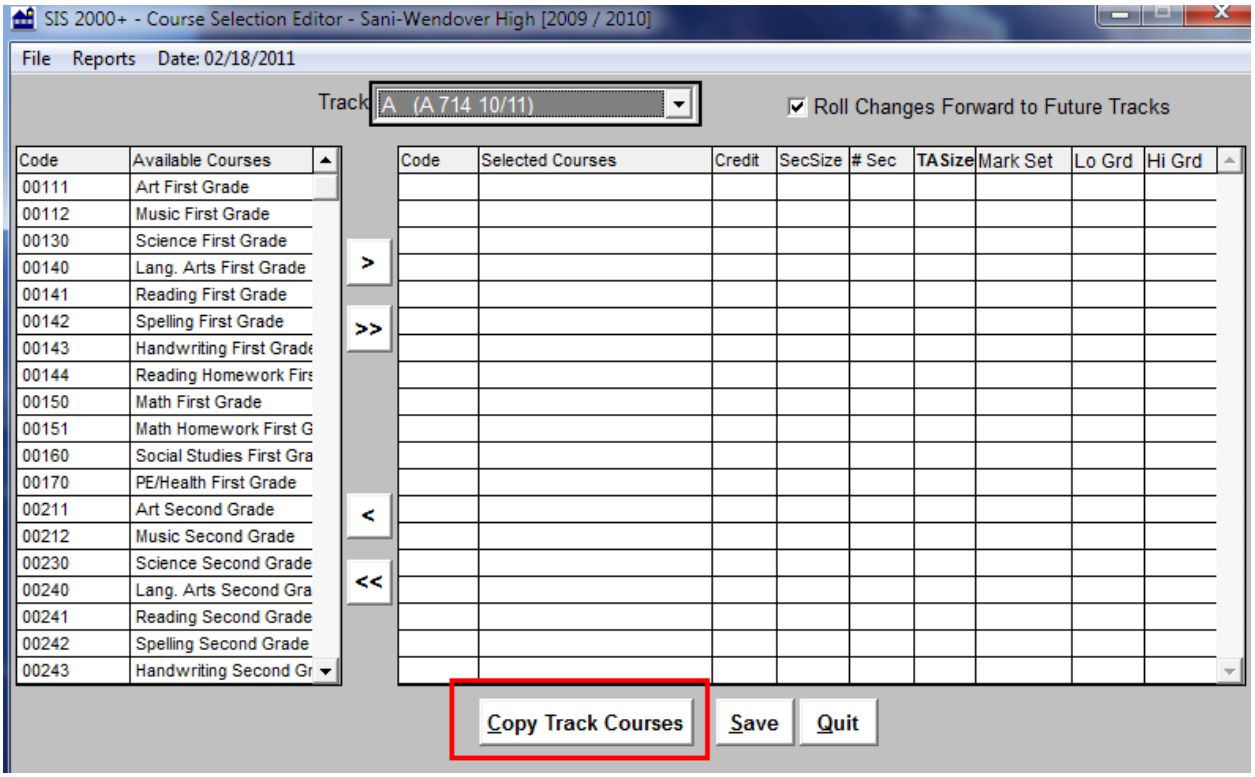
Go to Scheduling > Mass Scheduling > Course Selection.



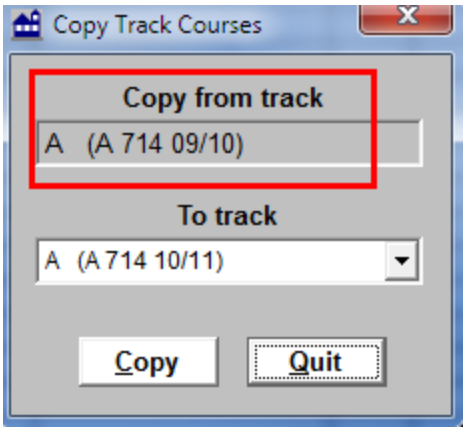
Make sure and choose the correct track from the drop-down at the top of the screen.

You'll see that currently there are no courses in that track.

If you are offering most of the same courses as this year, the simplest thing to do is to press **Copy Track Courses**.

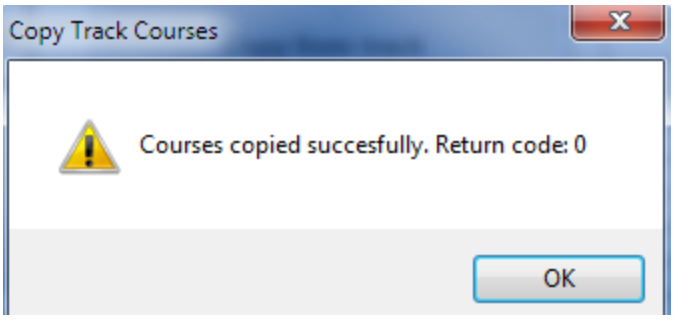


When you press "Copy Track Courses", you'll see a screen like the following screen.

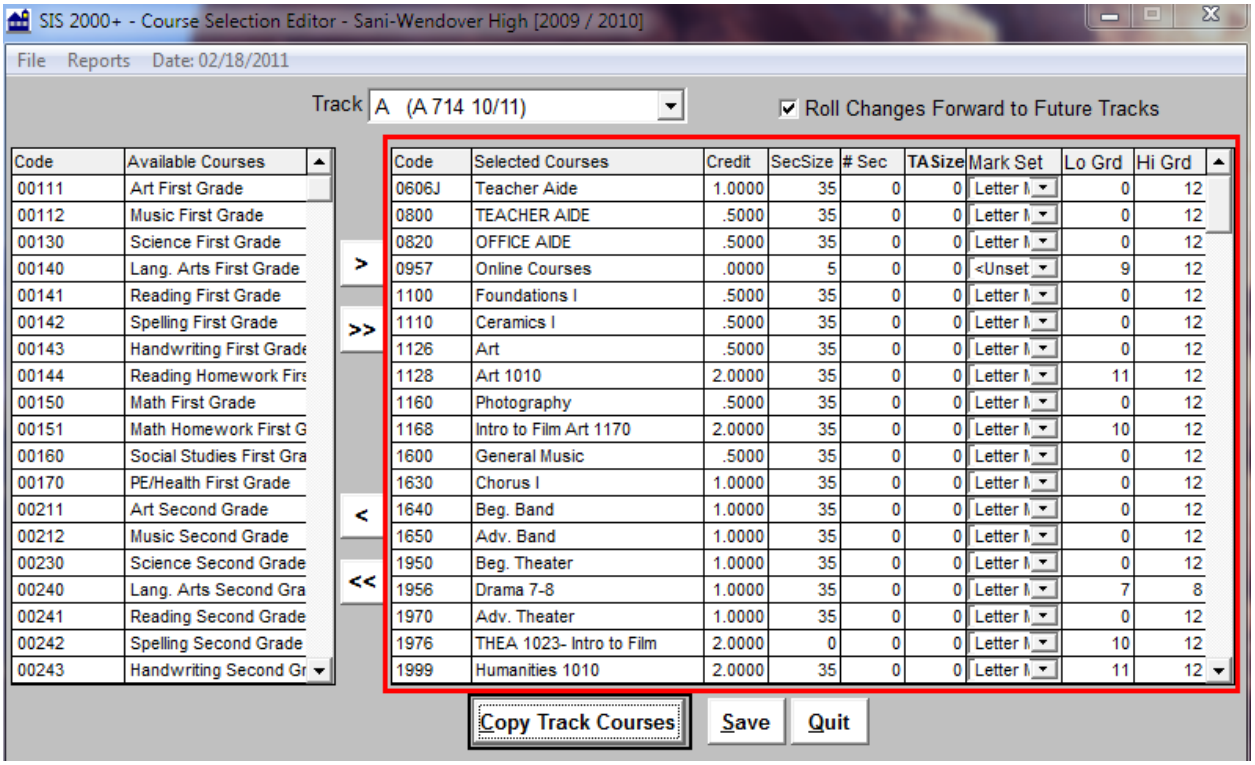


By default the system will copy the classes from the current track. This is not something you can change. Press **Copy** if you would like to proceed.

You will then get the message:



Press OK. You will then see a list of courses in the right pane.



If you choose the "Copy Track Courses" method, you can add additional courses by clicking on the course in the left-hand pane and then clicking on the right-pointing arrow to move it to the right side of the screen. You can also remove classes from the right-hand side by selecting them and then clicking on the left-pointing arrow.

Press **Save** when you are finished.

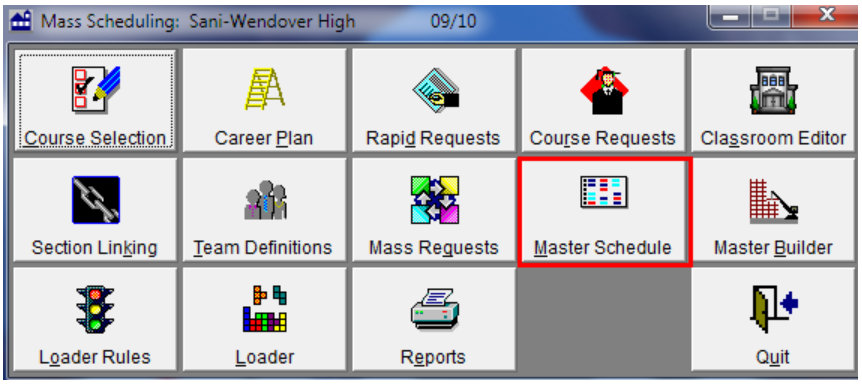
Of course, if you are totally revamping your schedule, you would not do this. In that case you would manually select the courses from the left-hand pane and move them over to the right-hand pane by clicking on the right pointing arrow.

Make sure to press **Save** when you've finished. Then **Quit**.

Set Up the Master Schedule for the Future Track

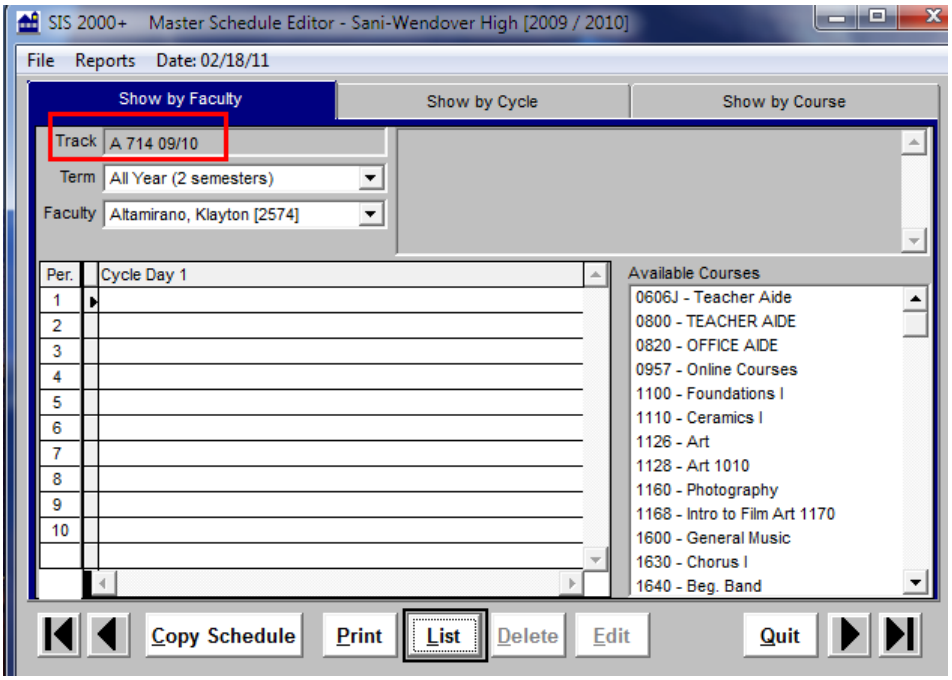
You're now ready to create the **Master Schedule**.

You can access the Master Schedule from two places. If you are still in the Scheduling module, you can click on Master Schedule from there.

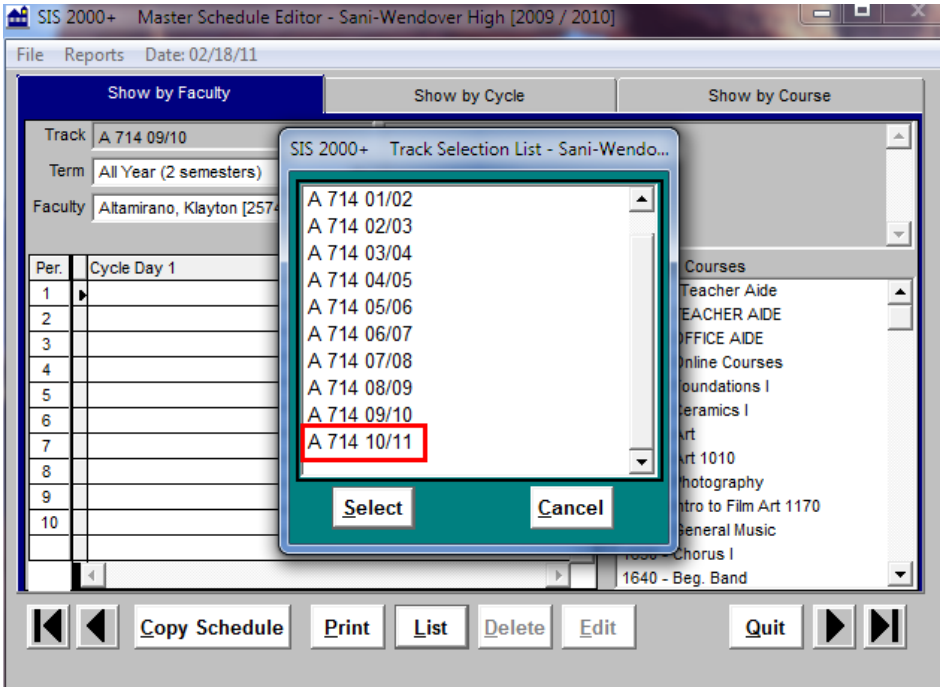


If you are on the Main Menu, you can then go to Scheduling > Master Schedule.

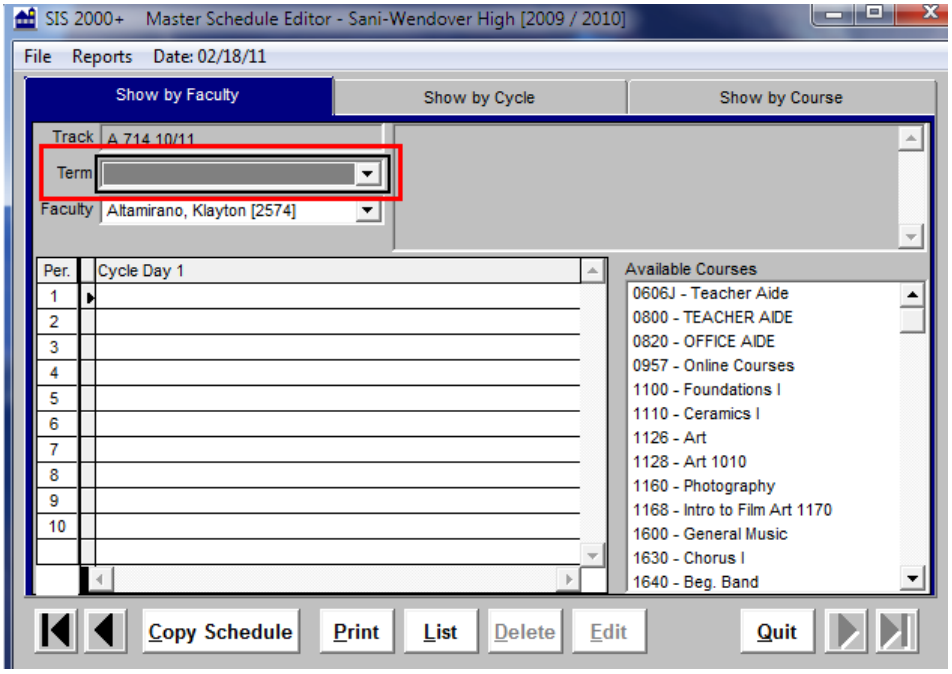
Once you pull up the Master Schedule screen, make sure to first select the correct track. Look at the top of the screen to see the track that is currently being displayed.



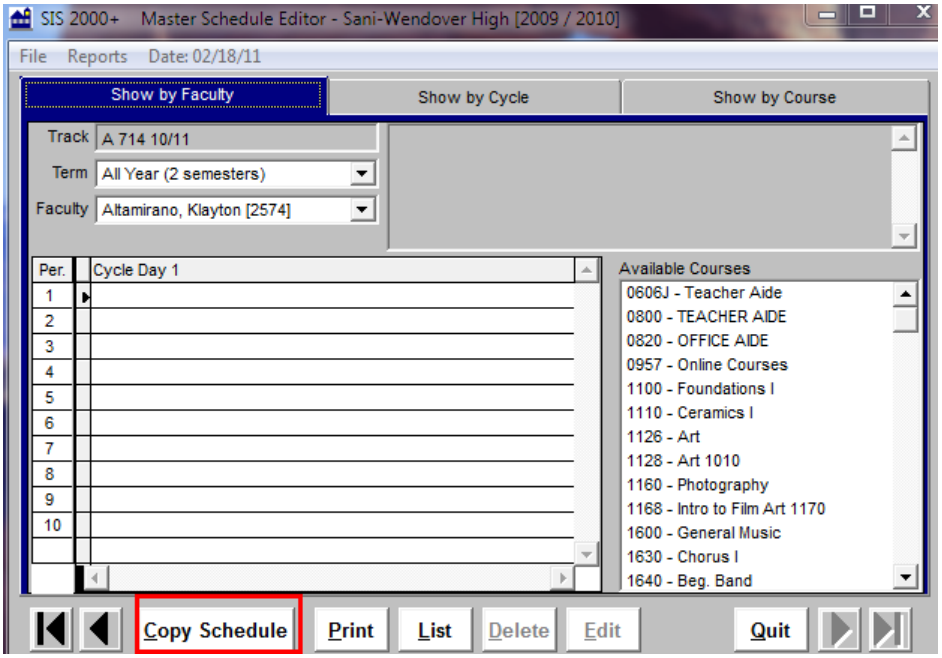
If you need to change to a different track, click on **List**. Then choose the correct track from the list and press **Select**.



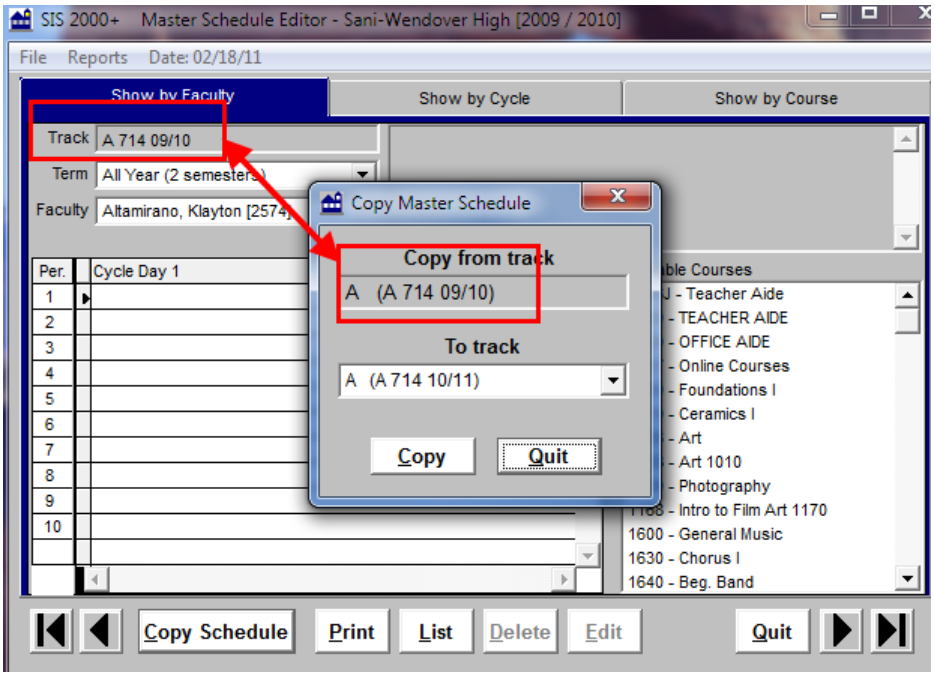
In the example displayed below, notice in the Term drop-down that there are no values. That is because I have not yet set up my calendar and definitions in the Track Editor (found under System > Track Editor). That needs to be done before I can move forward.



Once your track calendar and definitions are set, you're ready to assign courses to teachers. You can save quite a bit of time by copying your current master schedule to the new track, if the schedule will be remaining essentially the same.



To copy the schedule from your current track to the future track, click on **Copy Schedule**. **NOTE**: You need to be in the current track to be able to copy the schedule; otherwise the system will say there are no future tracks to copy to.



There may be a reason not to copy the schedule. If, in the new track, you've made changes to the number of cycle days that you have or made other major changes you won't want to copy the master schedule from the previous year. Instead, you can create a new master schedule manually.

Remember that if you start setting up your master schedule manually, you won't be able to use the "Copy Schedule" button.

Instructions for manually creating your master schedule is beyond the scope of this tutorial and is found in other documentation.

Special Note for Charter Schools

As we complete the process for New Year Initialization, there is one important note for Charter schools to remember. Charter schools each have a district office and that district office will need to be rolled over to the New Year just like the school itself.

To do that, you will need to:

- Create a future track for the district office.
- Create a calendar for the district office.
- Give the faculty in the district office a future status.
- There are no students in the district office, so you don't need to give a future status to students in the district office.

There are no courses and no master schedule so once you create the future status for the faculty, you have finished the new year initialization for the district office.

Review

We have now created the future track, promoted students and teachers into that track, have selected courses and created a master schedule.

You can now put in course requests for the students.

Also, any students enrolled as active in the current track, from this point on, will automatically have a future status record for next year, provided the student is not graduating.