

Step-by-Step Instructions for “New Year Initialization” SIS 2000+

Here are step-by-step instructions for New Year Initialization. Most districts begin these steps in the spring so they can enroll students that will be new the next school year.

Please also view the video called "New Year Initialization – 1/08" at

www.schools.utah.gov/sis2000/quick.htm And if you need general SIS documentation, please see www.schools.utah.gov/sis2000/details.htm

1. Geocode setup

The Geo Code is a required field on the Student Enrollment screen. Students without a valid Geocode will generate error messages from CLH_Edit.

- a. Click on System tile
- b. Click on Table Editor tile
- c. Go to the Geocodes table and make sure there is a code “A” set up for your school. Below is an example from AMES:

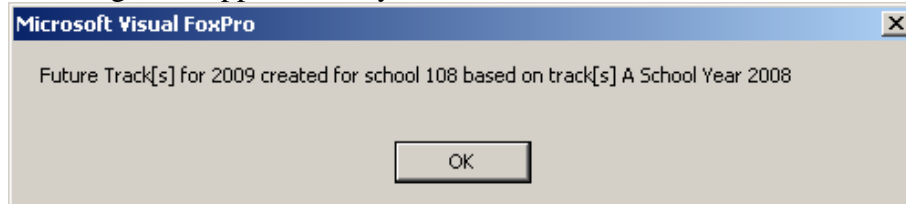
The screenshot shows a window titled "AMES SIS Remote Desktop - 198.60.16.12 - Remote Desktop". Inside, there is a "Table Editor" window for "ACDMY FOR MATH ENG & SCI [2008 / 2009]". The window shows a search for "Geocodes" in the "Table" dropdown, with a search button labeled "Find". Below the search area is a table with the following data:

geocode	Tiger file unique rec num	zipplus4	latdegree	longdegree	mapcoord	Description
A	0		0.0000000	0.0000000		AMES

2. Create Future Track

- a. Click on System tile
- b. Click on Track Editor tile
- c. Check if a future track is already created. Click on the ◀ at the bottom left corner of the screen. This will page you through the future tracks, if any are already created. You are setting up the track for the 09/10 school year. If it is already there and you have no changes to make, go on to step 3. If it is already there and you *do* have changes to make, you may have to delete it and create a new one (step 2d). Some fields do not allow edits. Try it and see.
- d. If the track for the 09/10 school year is not already there, just click on “Create Future Track”. You will be able to edit the various fields before clicking “Save”.

This message will appear when you click the “**Create Future Track**” button.



- e. The new track will be a copy of the old one, without dates. You do not need to finalize your school calendar in order to use this track to enroll future students or define courses in the track. However, you will need to enter it before you can **schedule students in the future track** (step 8 below).
 - f. Detailed documentation for the Track Editor are found at:
<http://www.schools.utah.gov/sis2000/System/index.htm>
3. Enroll future students
- a. If you are not yet ready to set up your course schedules, you can still enroll future students at this point.
 - b. **Enter the student normally, via the Student Entry Data screen** (clicking “New” on the Find/Add screen).
 - **Track = next year’s track**
 - **Grade = what grade will student be in next year?**
 - **Status = Future**
 - **Geocode = ‘A’ (You set this up in step 1)**

- **No Entry Date or Entry Code.** When you do your “New Year – Year End” procedure sometime **after July 15th**, the computer will automatically fill in the first day of the track as the entry date and an entry code of ‘E1’. At that time the student will automatically move to an “Active” status.

This is how it will look in the Student Editor (after clicking “Continue”):

- Click on the “Save” button.

4. Create Future Status Faculty/Students

Before you copy your current faculty and students to a “future” status, it is a good idea to clean up the active faculty records.

- a. Click on the System tile
- b. Click on the Faculty tile
- c. Click on the Status tab
- d. Page forward (click on ►) through your faculty. If any inactive faculty are listed as active, click on Edit and change the status and click Save. Do not change the status of active faculty that are not returning next year.

SIS 2000+ Faculty Editor - ACDMY FOR MATH ENG & SCI [2008 / 2009]
File Date: 02/18/2009

Last Name: AHO First: TAMARA Title: Teach
Faculty ID: 49 Gender: Female Ethnicity: White-Not of Hispanic Origin

General Address **Status** Certification Misc. Permissions

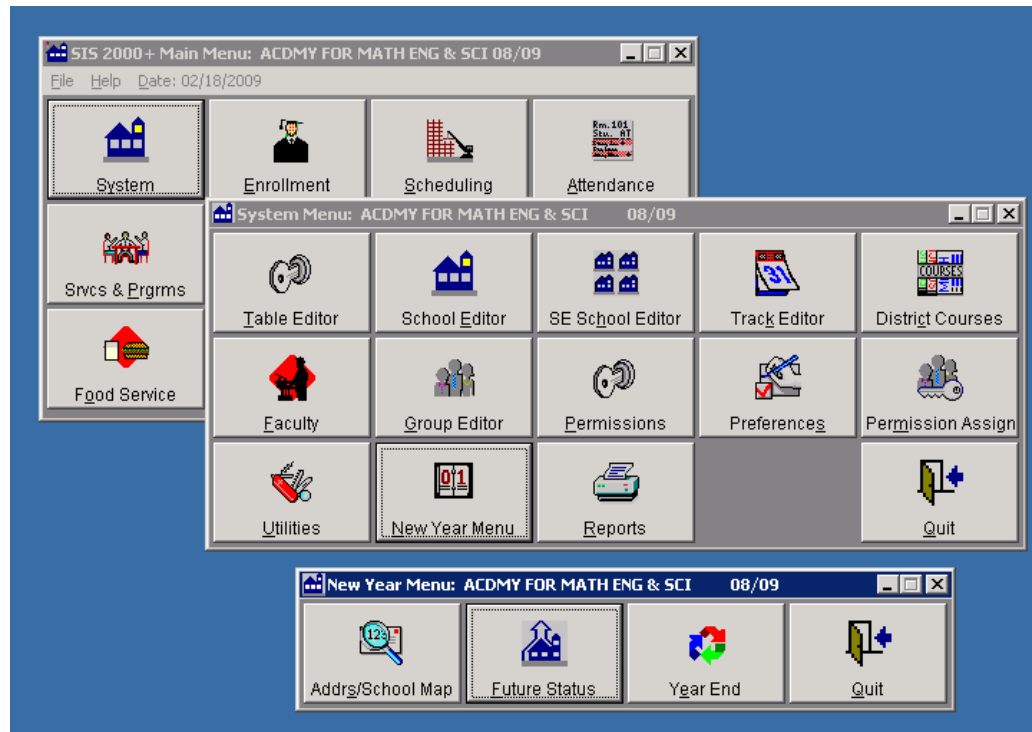
Display All Faculty Status Records

Status	Track	Job	Tchr	Cnslr	Cert
Active	A 700 08/09	<Unset>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Print Find List Delete Edit Add Save Quit

Now it is time to copy the current faculty and students to the future track.

- e. Click on System tile
- f. Click on New Year Menu tile
- g. Click on Future Status tile

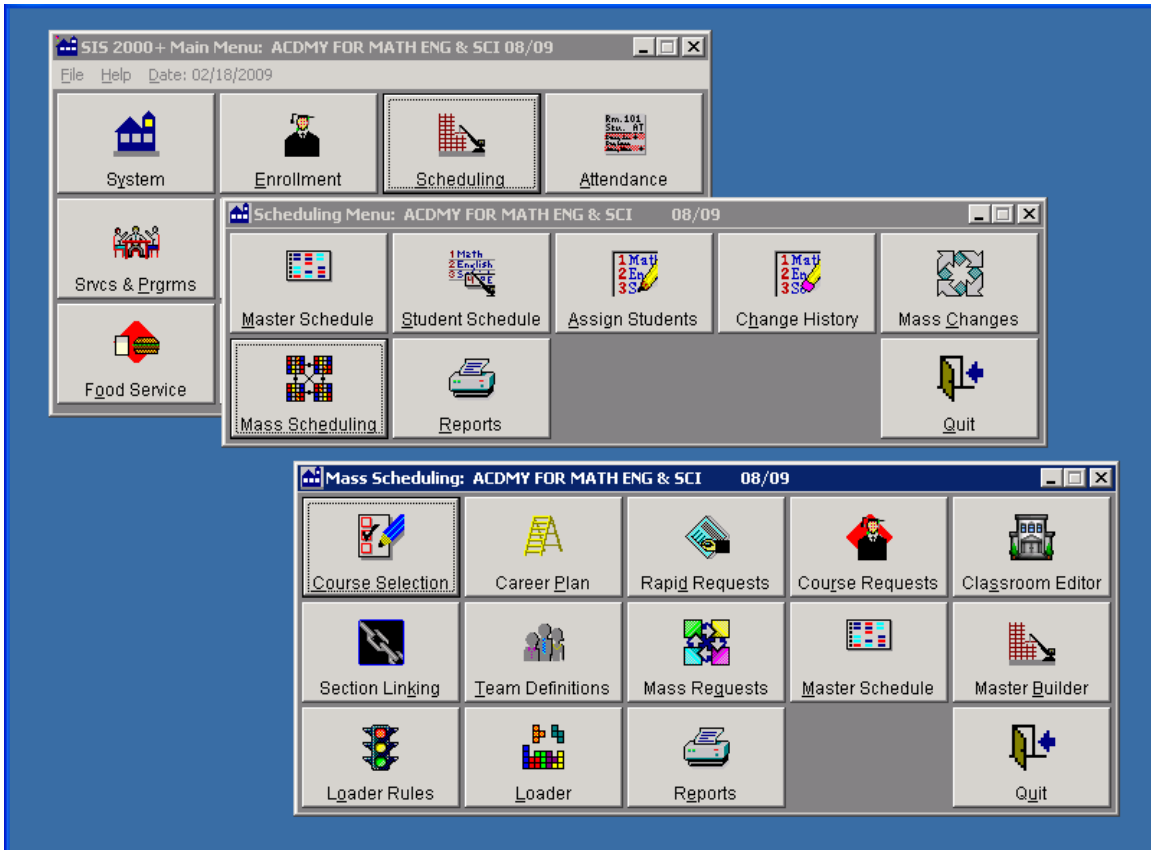


Note: This application now has only two options, create future status for faculty and create future status for students. Although most users will run both process together, it is possible to run just one or the other. If, for example, one wanted to begin work on a master schedule but did not want to promote the students, just the faculty promotion could be run.

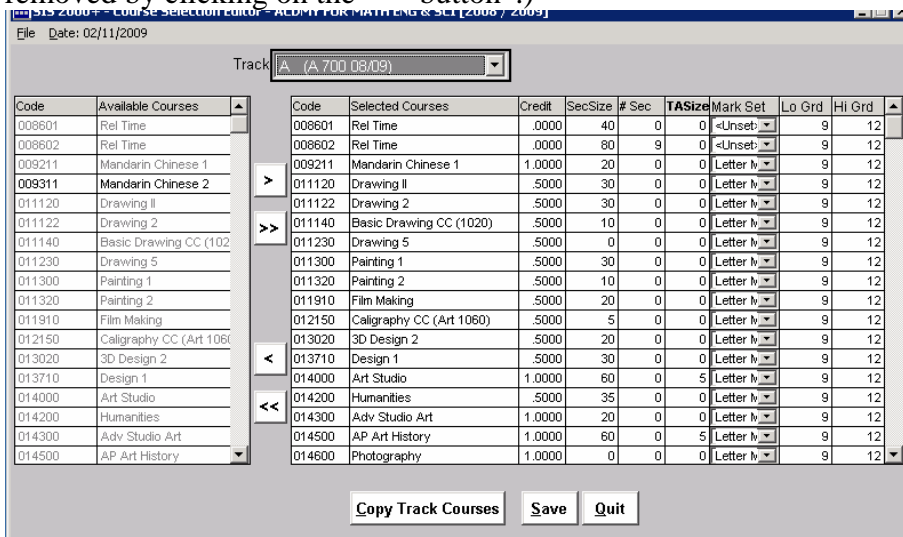
Create Next Year's Faculty Status Records

Create Next Year's Student Status Records

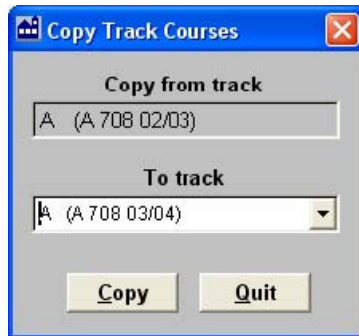
- h. Check the box next to the process(es) (Faculty, Student or both) that you wish to run. Note: If only the Faculty box can be checked, contact your USOE data specialist.
 - i. Click the Continue button.
 - j. Note: Once you have run this process, if you enroll any more students for the current track, they will also automatically get set up on the future track.
5. Copy Track Courses
- a. Click on Scheduling tile
 - b. Click on Mass Scheduling tile
 - c. Click on Course Selection tile



- d. The copy process copies all course records from one track to another. There can be **no** records on the new track. Use the pull down menu for the track and select your **new** track. If there are any courses listed on the right, check with your USOE data specialist. (Chances are the courses can all be removed by clicking on the “<< button”.)



- e. When there are no courses listed for the new track, click on the “Copy Track Courses”.



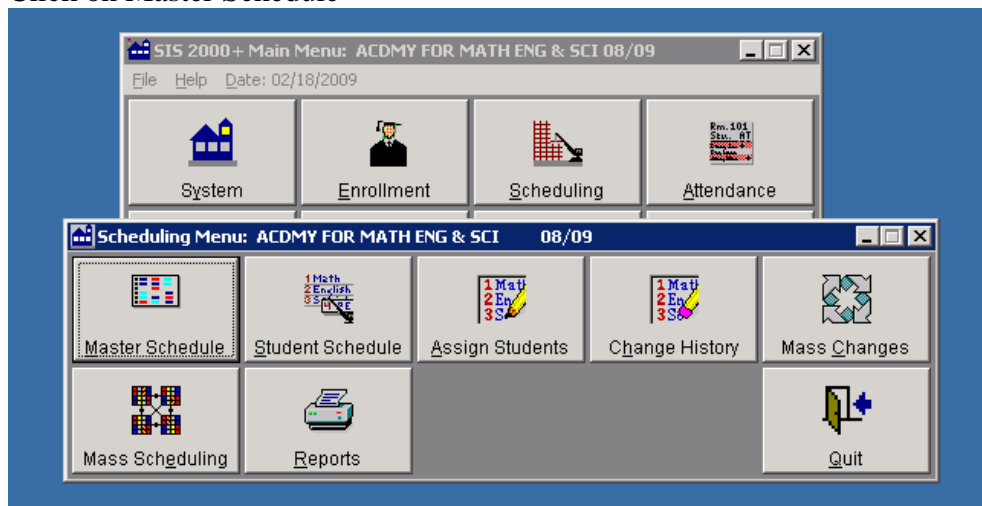
- f. It will assume you want to copy from the current track. Using the pull down menu, select the future track you wish to copy to.
- g. Click “Copy”
- h. You will get a message stating that the courses were successfully copied. Click “ok”, click “Quit” on the copy screen and then “Save”.
- i. You have now copied all course records from the current track to the future track. You can edit these later in step 7, after you copy the master schedule.

6. Copy Master Schedule

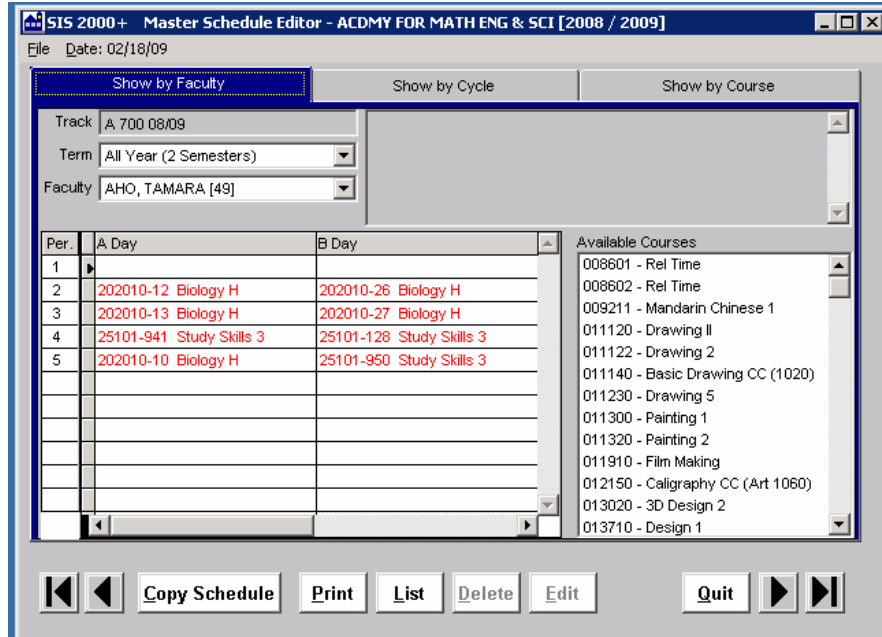
The Master Schedule Copy process copies only those courses that are assigned to a faculty member with a future status for the track to which you are copying. If a master schedule already exists on the track to which you are copying, the copy will not be allowed.

Examples: If in your current year master schedule you have several sections of course “3000 Biology”, but this course is not selected on your future track it will be ignored by the copy process. Also, if course 6000-1 is assigned to Mr. Smith in the current master schedule, and Mr. Smith does not have a future status record (step 4) course 6000-1 will be ignored by the copy process.

- a. Click on Scheduling tile
- b. Click on Master Schedule



- c. Click “Copy Schedule” button.



- d. On the Copy Screen, choose the track you wish to copy to, then click “Copy”.

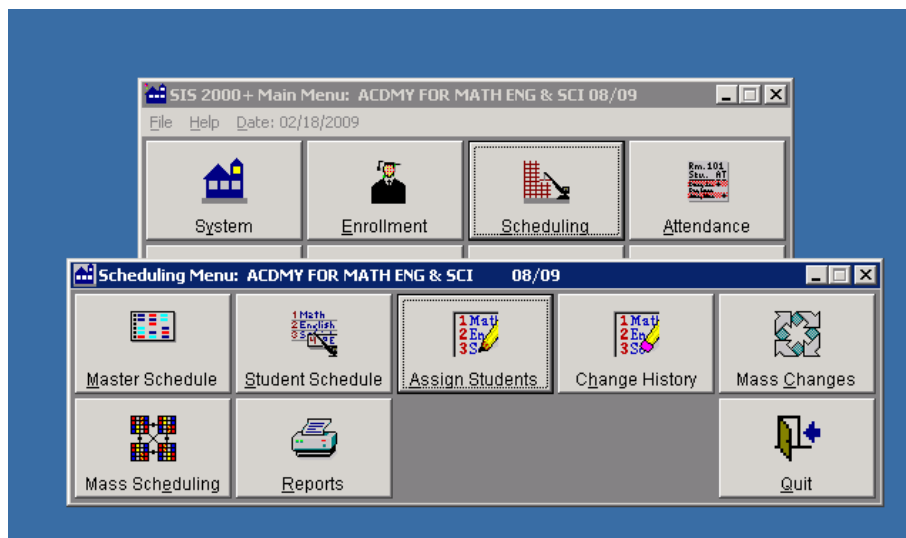


- e. You will get a message stating that the Master Schedule was successfully copied. Click “ok”, click “Quit” on the copy screen and then “Save”

7. Fine Tune Courses & Scheduling

- Return to the Course Selection Editor (steps 5a-c)
- Use the pull down menu for the track and select your future track.
- If you want to remove courses from the future track, highlight them on the right side of the screen and click the “< button”.

- d. If you want to add courses, highlight them on the left side of the screen and click the “> button” to move them over.
 - e. **What if the course you want to add is *brand new*?** First you would have to define it:
 - Click on System tile
 - Click on District Courses
 - Click on “Add” and define the course. It will now show up in the Course Selection Editor.
 - f. Look at the columns labeled “Credit”, “SecSize”, and “Mark Set”. Are these correct? After any edits, be sure to click “Save”.
 - g. Return to the Master Schedule Editor (steps 6a-b). If your teachers are going to be teaching courses that were not in this year’s schedule, you will need to add these to their Master Schedule. Or if they are no longer going to teach a course, you will need to remove these from their Master Schedule. **Be sure to click on ► to page forward to the future track on the Master Schedule screen.**
 - h. Now that your courses and teaching schedules are set up, you can assign students to the specific courses.
8. Schedule Students
- a. In step 2 above, you defined a new track so that you could enroll students to it. You were not required to enter calendar dates. However, you must **return to step 2** and define these dates before you are allowed to schedule students to the new track:
 - Year Begin & Year End
 - Term Begin & Term End for each term
 - b. Now, to schedule students, click on Scheduling tile



- c. Click on Assign Students tile
- d. Detailed documentation for this process is located at <http://www.schools.utah.gov/sis2000/Scheduling/index.htm>