

# AIM-SRM CALENDAR SETUP AND TRANSFER UTILITY

SPECIALIZED STUDENT SOLUTIONS | SCHOOL NUTRITION | STUDENT INFORMATION | FINANCIAL MANAGEMENT

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## **Calendar Setup**

 The Calendar Setup needs to be done <u>before</u> the start of every fiscal year to allow for the additional yearly tasks of Course Transfer, Course Check & Cleanup, Section Transfer, Section Check & Cleanup, and Student Transfer. This yearly task can be performed the moment you receive your schools calendar and holiday schedule. This task is performed by Administrative level AIM users.

## Calendar Setup "PROVIDER" ADMINISTRATION – Calendar

• The Calendar screen is where valid calendar fiscal years and calendar names are defined.

🙆 AIM (@DEV611) - [Provider Administration]
🙀 File Edit Menu Attendance Reports Utilities Survey Window Help
Image: Student         Image: Scan         Image: Scan
送◎×■• ■ ► ▼ > > =
Provider San Dieguito Union High School District
Provider Setup   Area Calendar   Calendar Details   Graduation Status   Site/Branch   gAttendance Close-Out   Printer Alignment
CAL_YEAR CALENDAR_NAME
1999 MAIN
2000 MAIN
2001 MAIN
2002 MAIN
2011 MAIN
* 2012 MAIN
h.







• The Calendar Details screen is where you supply details to the fiscal years' calendars.

🚵 AIM (oDEV611) - [Provider Administration]
🙀 File Edit Menu Attendance Reports Utilities Survey Window Help
Image: Student       Image: Scan
Provider San Dieguito Union High School District
Provider Setup Area Calendar Details Graduation Status Site/Branch Attendance Close-Out Printer Alignment On
Calendar Name/Fiscal Year MAIN, Fiscal Year: 2012   Entry Type ALL  Copy To
MAIN, Fiscal Year: 1999     Reporting Period       MAIN, Fiscal Year: 2000     MAIN, Fiscal Year: 2000       MAIN, Fiscal Year: 2001     Image: Constraint of the second seco
MAIN, Fiscal Year: 2012

After selecting the year in the Calendar Details screen, change the Entry Type field from the default: "ALL" to "TERM".

📤 AIM (@DEV611) - [Pro	vider Administration]
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Student Course Roster	Image: Scan     Imag
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Provider San Dieguito Union I	High School District
Provider Setup Area Cal	endar Calendar Details <u>G</u> raduation Status Site/ <u>B</u> ranch <u>e</u> Attendance Close-Out <u>Printer Alignment</u> O
Calendar Name/Fiscal Year	MAIN, Fiscal Year: 2012   Entry Type ALL  Copy To  ALL
Start Date End Date	e Description Period ATTENDANCE
▶ / / ···	HOLIDAY
	No. 100

Enter all of your terms for the year. When you transfer a section to a new term, you should choose to select the option for using the first and last day of the term as all sections' start and end date (to avoid losing section detail). This means that after the sections are transferred into the new term, any sections that don't meet for the entire term need to be edited. Because of this, it is very important that the majority of sections meet within your term dates. To illustrate this, if you only had one whole year term, you would be required to edit all the sections that did not meet from the first week to the last week of the fiscal year.





ł	📤 AIM (@DEV61	1) - [Provider A	.dministration]		
	🙀 File Edit Men	u Attendance R	eports Utilities Survey Window	v Help	
	Student Course	Roster Scar	Meports Employee Survey	Provider Setup Security Help	
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ſ	Provider San Diegu			•	
	Provider Setup	rea <u>C</u> alendar <sup>C</sup>	alendar Details <u>G</u> raduation Status	Site/Branch eAttendance Close-Out Printer Alignment On	lir
	Calendar Name/F	ïscal Year MAIN,	Fiscal Year: 2012 👤	Entry Type TERM     Copy To	
	Start Date	End Date	Description	Period	
	7/1/2012	6/30/2013	Term 1 Full Year	1	
	7/1/2012	8/31/2012	Term 2 Summer 1	2	
	9/8/2012	12/22/2012	Term 2 Fall	3	
	1/7/2013	6/8/2013	Term 3 Spring	4	
	6/10/2013	6/30/2013	Term4 Summer 2	5	

Now change the Entry Type to "HOLIDAY" and enter all holidays.

**NOTE:** It is very important to have already set up all of your holidays, before establishing any sections for the year. The system needs to calculate all meeting days and hours based off of section details and calendar setup. If you need to enter a new holiday after your sections are in place, the Utility - Sections Meetings Utility will need to be run after consulting with Harris School Solutions support.

📤 AIM (@DEV611) - [Provider	Administration]	
🙀 Eile Edit Menu Attendance	<u>R</u> eports <u>U</u> tilities <u>S</u> urvey <u>W</u> indow <u>H</u> elp	- 8 ×
Student Course Roster	San Reports Employee Survey Provider Setup Security Help	
<u>VBX Pn A</u>	K < ▶ N ∰ _	
Provider San Dieguito Union High S	chool District	
eAttendance Close-Out   Provider Setup   Area		Comment Codes Site/ <u>B</u> ranch
Calendar Name/Fiscal Year MAI	N, Fiscal Year: 2012   Entry Type HOLIDAY  Copy T	o
Start Date End Date	Description	
7/2/2012 7/4/2012	4th	
9/10/2012 9/10/2012	September 10 Day	
	CalDetail: Browsing Year: 2010 Term: 1 Prov: Billares L	Inified School Distr

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Entry Type "ATTENDANCE" is used to segment the Cumulative Average Daily Attendance and Enrollment report into specific time periods if you desire to use that report (there are more faster and flexible reports listed below). The reporting period column in the attendance group is selected to define the P1, P2, and Annual dates for subtotals on the Cumulative Average Daily Attendance and Enrollment report. The Attendance periods are whatever you want them to be. They usually are close to the calendar month but normally the attendance periods are setup to end on P1, P2, and Annual (Dec 31, April 15, and June 30). If you do not need to split the reporting periods for your P2 and Annual report on one report and would like to run each separately, you could use the more recently developed reports for the P1, P2, and Annual ADA: the ADA by High School District report or the ADA by Section and Attendance Type.

Image: Student         Image: Score         Image: Scor						
<u> 8 X</u>	Bo A	H   I   F   H   ∰				
Provider San Di	ieguito Union High S	shool District	•			
eAttendanc	e Close-Out	Printer Alignment	Online Registration	User-Defined Fie	lds Comme	nt Codes
Provider Setup Area Calendar Calendar Calendar Status Site/Branch						
Pro <u>v</u> ider Se	tup <u>A</u> rea	<u>C</u> alendar	Calendar Degalis	<u>G</u> raduation S	tatus   Site	/ <u>b</u> ranch
Calendar Nam	e/Fiscal Year MAII	N, Fiscal Year: 2012	✓ Entry Type	ATTENDANCE		_
Calendar Nam	e/Fiscal Year MAII	N, Fiscal Year: 2012	Entry Type     Reporting Period	ATTENDANCE		
Calendar Nam Start Date 7/1/2012	e/Fiscal Year MAII End Date 7/28/2012	N, Fiscal Year: 2012 Description Period 1	Entry Type     Reporting Period	ATTENDANCE		_
Calendar Nam Start Date 7/1/2012 7/29/2012	e/Fiscal Year MAII End Date 7/28/2012 8/25/2012	N, Fiscal Year: 2012 Description Period 1 Period 2	Entry Type     Reporting Period     Z	ATTENDANCE		_
Calendar Nam Start Date 7/1/2012	e/Fiscal Year MAII End Date 7/28/2012	N, Fiscal Year: 2012 Description Period 1	Entry Type     Reporting Period	ATTENDANCE		_

## Copy To... Button

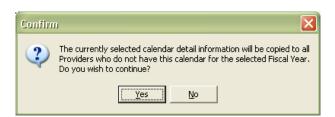
All calendar details can be copied to another provider in the same fiscal year or to all other providers in a fiscal year and then they can be edited as needed.





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The calendar reports; District Calendar (by Date Type) or District Calendar (Chronological) can be run if needed to view the calendar setup.

		Scuela Adu	It School TIONAL PROGRAM		
September 09,2005	DISTRICT	T CALENDA Time Pe Provider			11:28:30A
		2004/2	005		
Escuela Adult School					
ATTENDANCE PERIODS	Start Date	End Date	Description	Period	
	7/1/2004	- 7/24/2004	PERIOD 1	1 Reporting Period	
	7/26/2004	- 8/21/2004	PERIOD 2	2 Reporting Period	
	8/23/2004	- 9/18/2004	PERIOD 3	3 Reporting Period	
	9/20/2004	- 10/16/2004	PERIOD 4	4 Reporting Period	
	10/18/2004	- 11/13/2004	PERIOD 5	5 Reporting Period	
	11/15/2004	- 12/11/2004	PERIOD 6	6 Reporting Period	
	12/13/2004	- 1/8/2005	PERIOD 7	7 Reporting Period	
	1/10/2005	- 2/5/2005	PERIOD 8	8 Reporting Period	
	2/7/2005	- 3/5/2005	PERIOD 9	9 Reporting Period	
	3/7/2005	- 4/2/2005	PERIOD 10	10 Reporting Period	
	4/4/2005	- 4/30/2005	PERIOD 11	11 Reporting Period	
	5/2/2005	- 5/28/2005	PERIOD 12	12 Reporting Period	
	5/30/2005	- 6/25/2005	PERIOD 13	13 Reporting Period	
	6/27/2005	- 6/30/2005	PERIOD 14	14 Reporting Period	
HOLIDAYS	Start Date	End Date	Description		
	7/5/2004	- 7/5/2004	INDEPENDENCE DAY		
	9/6/2004	- 9/6/2004	LABOR DAY		
	11/11/2004	- 11/11/2004	VETERANS DAY		
	11/25/2004	- 11/26/2004	THANKSGIVING		
	12/24/2004	- 12/25/2004	CHRISTMAS		
	1/1/2005	- 1/1/2005	NEW YEARS		
	1/17/2005	- 1/17/2005	MARTIN LUTHER KING		
	2/7/2005	- 2/7/2005	LINCOLN DAY		
	2/21/2005	- 2/21/2005	PRESIDENT'S DAY		
	3/28/2005	- 3/28/2005	EASTER		
	5/30/2005	- 5/30/2005	MEMORIAL DAY		
TERMS	Start Date	End Date	Description	Period	
	7/1/2004	- 6/30/2005	TERM	1	

Once the calendar details are setup for the new year, you can proceed to the Transfer Utility procedure.







## **Transfer Utility**

The Transfer Utility is divided into 3 steps. Step 1 moves courses from on fiscal year to another. Step 2 should be performed in two parts first transferring sections then transferring students as needed and Step 3 is now obsolete.

🙆 Course/Section/Student/Competency Transfer Utility				
Transfer Steps				
• Step 1: Course Transfer Utility (Transfer Course)				
Step <u>2</u> : Section/Student Transfer Utility (Transfer Section / Student-Enrollment)				
Step <u>3</u> : Competency Transfer Utility (Transfer Competency)				
<u>श्रिक्ष S</u> tart				

Step 1 is the Course Transfer Utility. This is normally done once a year before the beginning of the new school year.

 Click "Utilities" (on the Menu Bar) then click "Transfer Utility" or press <ALT - U> then < T >.







📤 AIM (@DEV611) File Edit Menu Attendance Reports	Utilities Survey Window Help	
Student     Course     Easter     Scan       Image: Student     Image: Student     Image: Student     Image: Student     Image: Student       Image: Student     Image: Student     Image: Student     Image: Student     Image: Student     Image: Student       Image: Student     Image: Student     Image: Student     Image: Student     Image: Student     Image: Student	Programming Duplicate Student Utility QuikServ (B) Transfer Utility TopsPro	Recurity Relp
C THE	Import Utilities	E CIAN
Con The	CE STER	E CIER
167 Mar	Calendar: Not active Year	: 2010 Term: 1 Prov: Billares Unified School Distr

2. The "Course/Section/Student/Competency Transfer Utility" window will open.

📤 Course/Section/Student/Competenc	y Transfer Utility	
Transfer Steps		
• Step <u>1</u> : Course Transfer Utility (Tra	insfer Course)	
C Step <u>2</u> : Section/Student Transfer I	Utility (Transfer Section / Student-Er	nrollment)
C Step <u>3</u> : Competency Transfer Utility	y (Transfer Competency)	
	Start	<u>I</u> <u>C</u> lose

This screen is used to select the information to transfer: course, section, student, and competency. The transfer process can be performed as many times as is needed.

3. Select Step 1 for the Course Transfer.



4. Click the "Start" button to begin the selected process.

#### Step 1: Course Transfer Step 1:

00						
*	Course/Section/Student/Competency Transfer Utility					
	Transfer Steps					
	• Step <u>1</u> : Course Transfer Utility (Transfer Course)					
	© Step <u>2</u> : Section/Student Transfer Utility (Transfer Section / Student-Enrollment)					
	Step <u>3</u> : Competency Transfer Utility (Transfer Competency)					
	Start Close					

Step 1, the **Course Transfer Utility** is used to transfer the course information from one fiscal year to another fiscal year to avoid manual entry. <u>Courses should be</u> <u>transferred prior the beginning of a new school year, once a year only.</u> The source fiscal year and the target fiscal year must have a calendar setup for them. If you will be offering most of the same courses in the new school year as the previous school

year, complete the Course Transfer procedure. This transfer procedure transfers all courses.

After Step 1 you will need to perform a manual Course Cleanup. You may modify, delete and add courses transferred into the new school year. Next is Step 2.

Step 2 transfers the sections or students into a new term. This is normally done before the beginning of each term. Although both Section and Student are available to select together, you should first only send the sections and perform a manual Section Cleanup before proceeding to transfer any students that are continuing on in the sections.







Course Transfer Utility	X
Fiscal year to transfer from 2011	
Fiscal year to transfer to 2012	
OK X Cancel	

#### 5. Click "**OK**". <u>The transfer will begin</u>. Do not interrupt this process.

A window will open displaying the status of the transfer.

Transfer Courses Progress	
Total courses found in fiscal year 2011	670
Number of courses found in fiscal year 2012	670
Number of courses transferred from fiscal year 2011 to fiscal year 2012	0
Transfer courses completed.	

The "Transfer Course Progress" window will open showing the status of the transfer.

When the transfer has completed, click "OK" to close the window.

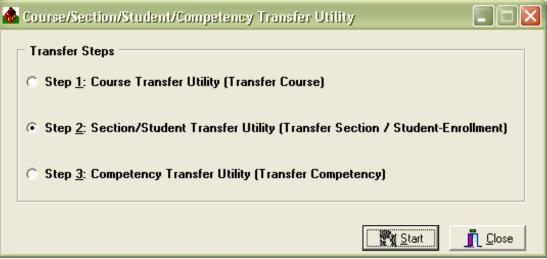
**NOTE:** If you **must interrupt** the transfer process click the "**Abort**" button. This action can result in a partial transfer (not recommended). The system will automatically leave the Transfer Utility open with Step 2 selected.

# **Course Check & Cleanup**



The Course Cleanup process is performed after the Course Transfer to update and eliminate old courses. First verify the transfer of the courses by checking the Course – Course Information screen (be sure to change to the "transferred to" year.) You could also compare the Course Master Schedule reports for the two years. Once a Course Transfer is complete, it is the one time, all year that you can cleanly delete any courses that are no longer taught and to make changes to the course setup. Unused courses if not deleted can sit on databases for years. After deleting unused courses, any sections taught in the previous year will not transfer into any of the terms in the new year since no identical course code exists. Entering back in any previously taught courses if needed can be performed at any time during the year.

# Section Transfer Step 2(a):



Step 2, the "**Section/Student Transfer Utility**" is used to transfer ("rollover") the section information or the student enrollment information from one fiscal year and term to another fiscal year and term for a given provider.

Although both Section and Student are available to select together, it is recommended that you should run them separately; <u>first send the sections</u> and then perform a manual Section Cleanup before proceeding to transfer any students that are continuing on in their courses, if needed.

# **Section Transfer**

Sections are term dependent. Sections must be entered manually each term or transferred from another term using the Transfer Utility. If you will be offering most of the same sections in the new term as the previous (or another term), complete the Section Transfer procedure. You may modify, delete, or add sections in the new term



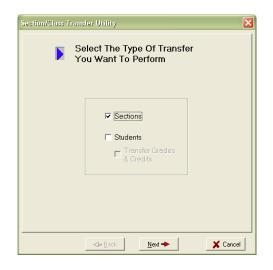


after the transfer procedure. You will be able to transfer all or a portion of your sections or students.

**NOTE:** It is very important to have already set up <u>all</u> of your holidays, before using the Utilities – Transfer Utility to transfer the sections. If you need to enter a new holiday after your sections are in place, the Sections Meetings Utility will need to be run after consulting Harris School Solutions support.

- 1. If you closed the Transfer Utility, open it and select Step 2 for the Section/Student Transfer.
- 2. Click the "Start" button to begin the selected process.
- 3. Click in the "Sections" check box.

**NOTE:** Do not transfer "Students" unless: you have first setup sections (either by entering the sections manually <u>or</u> previously transferring sections).



 Click the "Next" button to continue with the transfer process. The "Section/Class Transfer Utility" window with Provider and source and destination Fiscal Years and Terms will open.



	R	HARRIS School Solutions
Section/Class Transfer Utility		

Select The Trar and Terms	nsfer Pro	ovider, Fis	cal Years
Provider Billares Unified School District			•
From: Fiscal/Year 2011 🛊 Term 1 💠		To: FiscalYear Term	2012 🛫
<b>de</b> <u>B</u> ack	<u>1</u>	<u>v</u> ext +	🗶 Cano

5. Click the "Next" button to continue with the transfer process.

The next screen is used to choose the proper method to define all the transferred sections' start and end dates in the destination term.

Section/Class Transfer Utility	X
Method for choosing section start and end date.	
Calculate based on week numbers.     Always use first and last day of the term.	
→ Back Next → X Cance	

Note: It is recommended to first send the sections over selecting the "Always use first and last day of the term" method. This will avoid sections from transferring over to the new term with no dates assigned (from short terms and Override Holiday). Then take the time to check and edit those dates in the new term. After all sections are reviewed you can send any students as needed.



6. Click in the "Always use first and last day of the term" check box then click the "**Next**" button to continue with the transfer process.

The **Section/Student** transfer process allows you to filter to specify what you wish to transfer. You may transfer **ALL** sections or students, or you may transfer only certain sections or students as determined by your **Student, Course** or **Program** filter. You may make more than one of each selection, but the filters are unrelated.

Section/Class Transfer Ut	ility	×
Select	The Items To Transfer	
All Course Program Section	₹ ALL SECTIONS	
	Back	:el

Click "ALL" to transfer all sections or students.

Click "**Course**" to select to transfer only the sections or student enrollments attached to one or more courses.

Click "**Program**" to transfer only the sections or student enrollment attached to one or more programs.

Click "**Section**" to transfer one or more sections or one or more student enrollment sections. **NOTE:** Clicking any of these choices will open up a "Filter" window. Make your selections by clicking in the check boxes.

Click the "Clear All" button to remove the selections in the list box.

Click the "Back" button to return to the previous screen.

Click the "Next" button to continue with the transfer process.

Click the "Cancel" button to exit from the transfer process.





Section/Class Transfer Utility	X		
Summary of Items To Transfer			
Sections			
Students			
Provider: Billares Unified School District			
From: Fiscal Year: 2011 <u>To:</u> Fiscal Year: 2012			
Term: 1 Term: 1			
Courses: 524, AC/HEATING/REFRIG/ADV,			
<	>		
📥 Back 📑 Transfer 🗶 Cano	;el		

The "**Section/Class Transfer Utility**" window with Summary Information will display. All items previously selected will display.

## THIS IS YOUR LAST OPPORTUNTITY TO DETERMINE WHAT IS TRANSFERRED. PROCEEDING WITH THE "TRANSFER" BUTTON WILL INITIATE THE TRANSFER OF SECTIONS.

Click the **"Back**" button to return to previous screens to make any necessary adjustments.

Click the "Cancel" button to exit from the transfer process.

**IF ALL INFORMATION IS CORRECT AND YOU ARE READY TO PROCEED WITH THE TRANSFER OF SECTIONS,** click the "**Transfer**" button to execute the requested transfer process. A dialog box will popup during the transfer execution displaying the transfer progress.



The "Transfer Sections/Students Progress" window will open showing the status of the transfer.

Provider: Billares Unified School District Transfer Sections		Transfer Students
Total sections in fiscal year 2008 term 1	37	Total students in fiscal year 2008 term 1
Number of sections processed	6	Number of students processed
Number of sections doesn't have the course in fiscal year 2009	0	Number of students doesn't have the section & course in fiscal year 2009 term 1
Number of sections exists in fiscal year 2009 term 1	3	Number of students exists in fiscal year 2009 term 1
Number of sections transferred	3	Number of students transferred

The process can be quite lengthy depending on what was selected. Wait for the process to complete. If you **must interrupt** the transfer process click the "**Abort**" button. This action can result in a partial transfer. We do not recommend that you interrupt the process.

When the transfer has completed, click "OK" to close the window.

## **Section Check & Cleanup**

The Section Cleanup process is performed to update and eliminate unused sections. First verify the transfer of the sections and section detail by looking the Course – Section Details screen (be sure to change the 'transferred to' Year and Term). You could run the Section Directory reports.

# **Student Transfer (Optional)**

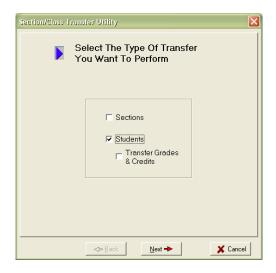




After performing the Section Transfer and cleaning up the results, if you have students that are going to continue on in the same section in a new term then you will run the Student Transfer.

St	udent Transfer Step 2(b):
	Course/Section/Student/Competency Transfer Utility
	Transfer Steps
	Step <u>1</u> : Course Transfer Utility (Transfer Course)
	• Step <u>2</u> : Section/Student Transfer Utility (Transfer Section / Student-Enrollment)
	Step <u>3</u> : Competency Transfer Utility (Transfer Competency)
	Start Close

- 1. If you closed the Transfer Utility, open it and select Step 2 for the Section/Student Transfer.
- 2. Click the "Start" button to begin the selected process.



3. Click in the "Students" check box to transfer Students.

**NOTE:** Do not transfer "Students" unless: you have first setup sections (either by entering the sections manually <u>or</u> previously transferring sections).



If you do not want to transfer the student grades and credits to the new term, leave that selection unmarked.

- Click the "Next" button to continue with the transfer process. The "Section/Class Transfer Utility" window with a filter to restrict by Course, Program, or Section will open.
- 5. After making your filter selections, click the "**Next**" button to continue with the transfer process.

Section/Class Transfer Utility			
Summary of Items To Transfer			
Sections			
Students Enroll Date:			
Provider: Billares Unified School District			
From: Fiscal Year: 2011 <u>To:</u> Fiscal Year: 2012			
Term: 1 Term: 1			
Sections: 222,			
	>		
← Back Park Cano	el		

The "**Section/Class Transfer Utility**" window with Summary Information will display. All items previously selected will display.

#### THIS IS YOUR LAST OPPORTUNTITY TO DETERMINE WHAT IS TRANSFERRED. PROCEEDING WITH THE "TRANSFER" BUTTON WILL INITIATE THE TRANSFER OF STUDENTS.

Click the **"Back**" button to return to previous screens to make any necessary adjustments.





Click the "Cancel" button to exit from the transfer process.

**IF ALL INFORMATION IS CORRECT AND YOU ARE READY TO PROCEED WITH THE TRANSFER OF STUDENTS,** click the "**Transfer**" button to execute the requested transfer process. A dialog box will popup during the transfer execution displaying the transfer progress.

#### Step 3: (Optional)

🚯 Course/Section/Student/Competency Transfer Utility
Transfer Steps
C Step <u>1</u> : Course Transfer Utility (Transfer Course)
© Step <u>2</u> : Section/Student Transfer Utility (Transfer Section / Student-Enrollment)
• Step <u>3</u> : Competency Transfer Utility (Transfer Competency)
Start Close

Step 3: Competency Transfer Utility is optional because has been replaced with a copy/paste procedure covered in the Competency training.



