# AIM-SRM CALENDAR SETUP AND TRANSFER UTILITY

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.
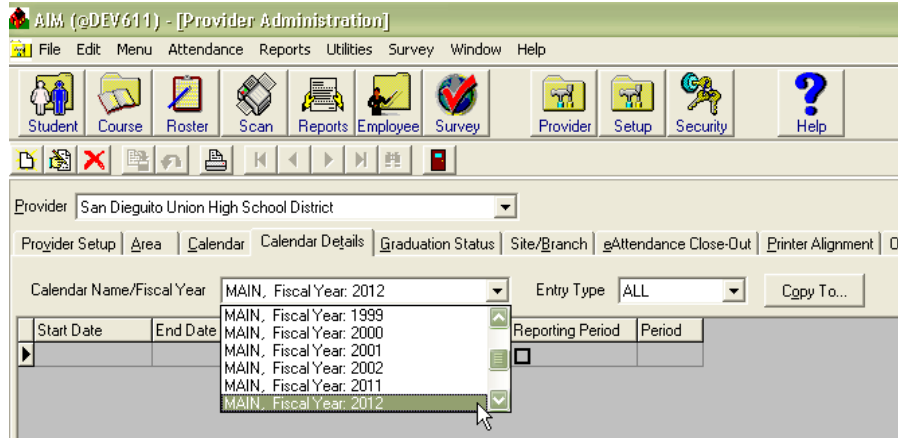
Calendar Setup
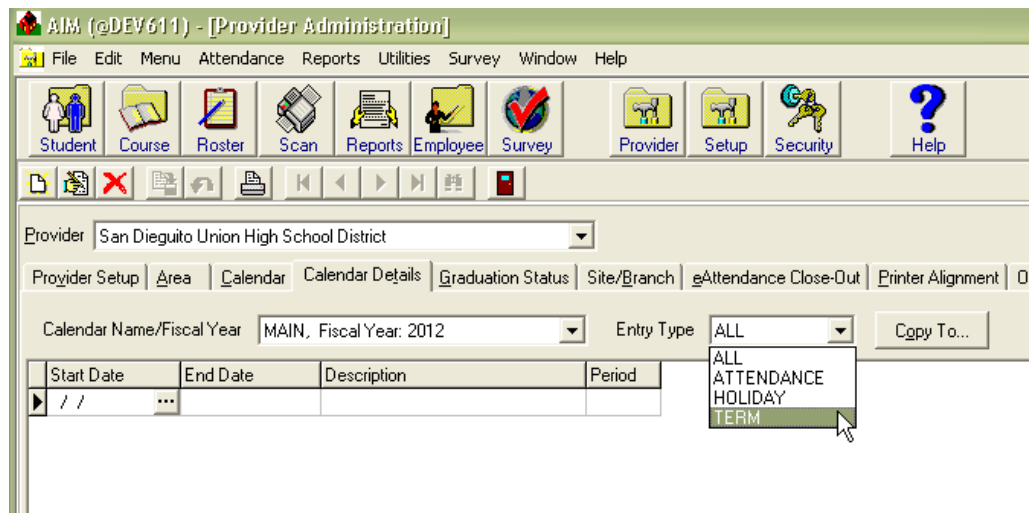### "PROVIDER" ADMINISTRATION – Calendar

- The Calendar screen is where valid calendar fiscal years and calendar names are defined.
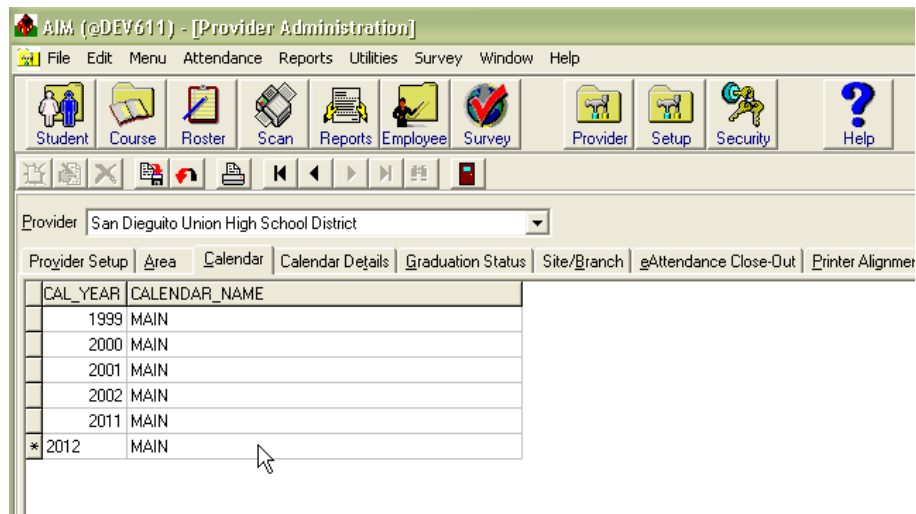
- The Calendar Details screen is where you supply details to the fiscal years' calendars.

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


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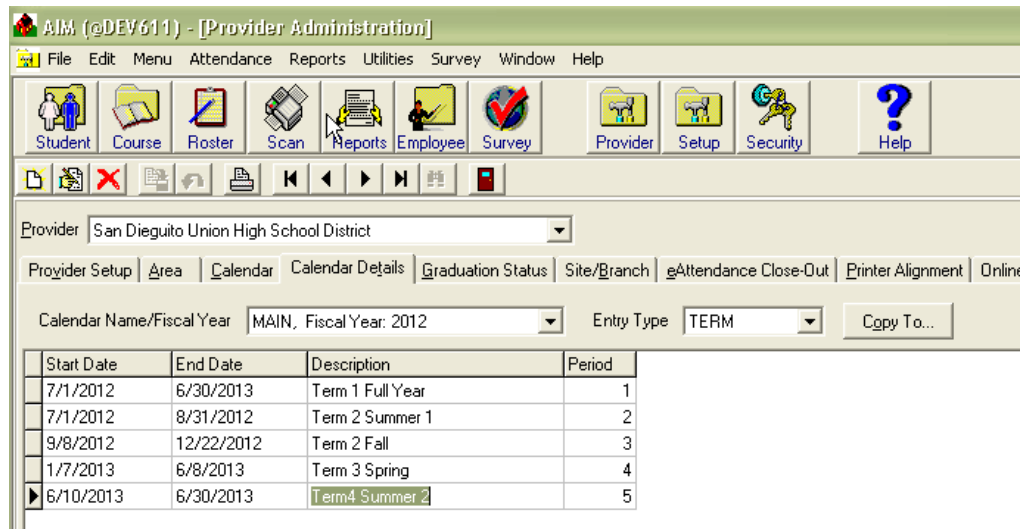
Now change the Entry Type to "HOLIDAY" and enter all holidays.

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.
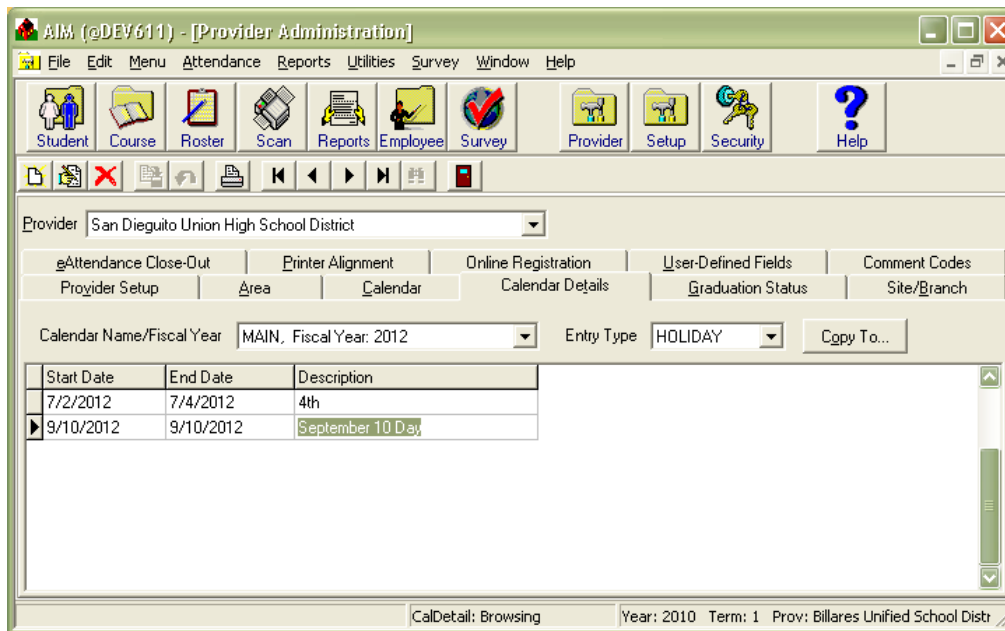
Entry Type "ATTENDANCE" is used to segment the Cumulative Average Daily Attendance and Enrollment report into specific time periods if you desire to use that report (there are more faster and flexible reports listed below). The reporting period column in the attendance group is selected to define the 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.
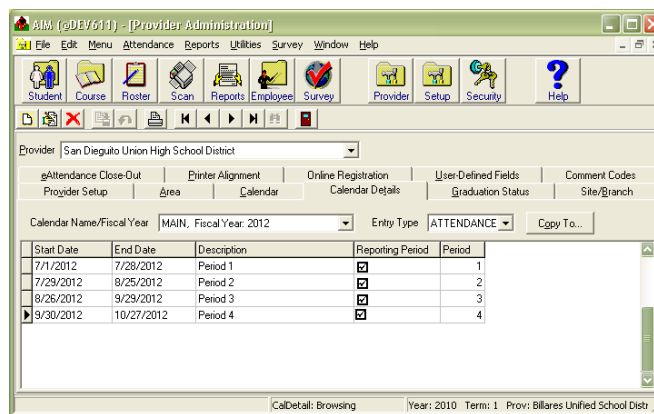
Copy To… Button
All calendar details can be copied to another provider in the same fiscal year or to all other providers in a fiscal year and then they can be edited as needed.
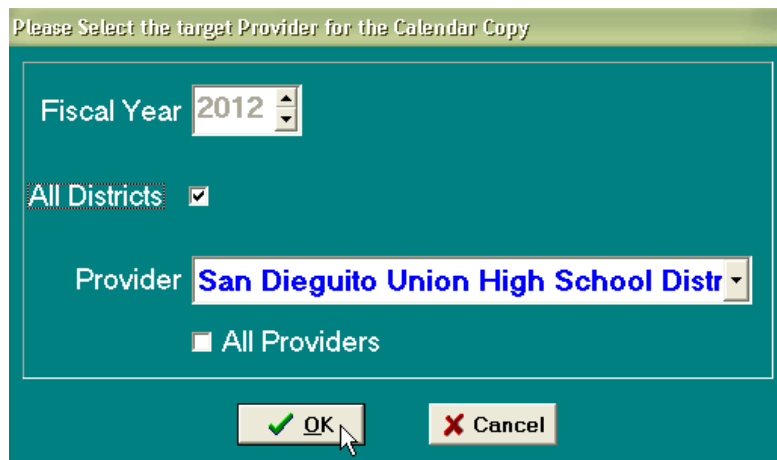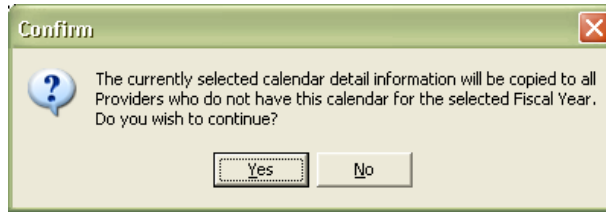
The calendar reports; District Calendar (by Date Type) or District Calendar (Chronological) can be run if needed to view the calendar setup.

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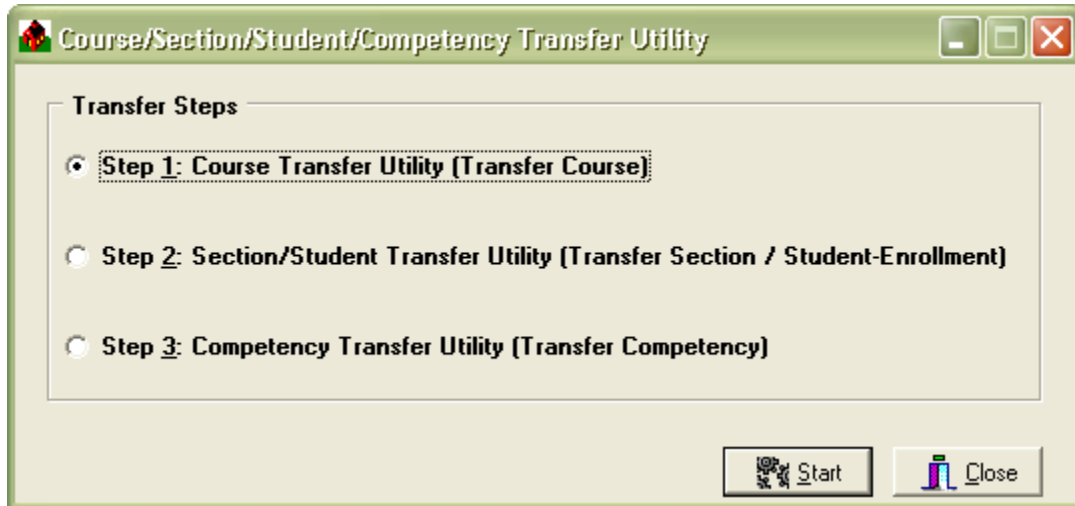
Step 1 is the Course Transfer Utility. This is normally done once a year before the beginning of the new school year.

1. Click "**Utilities**" (on the Menu Bar) then click "**Transfer Utility**"
    <u>or</u> press <**ALT - U**> then < **T >.**
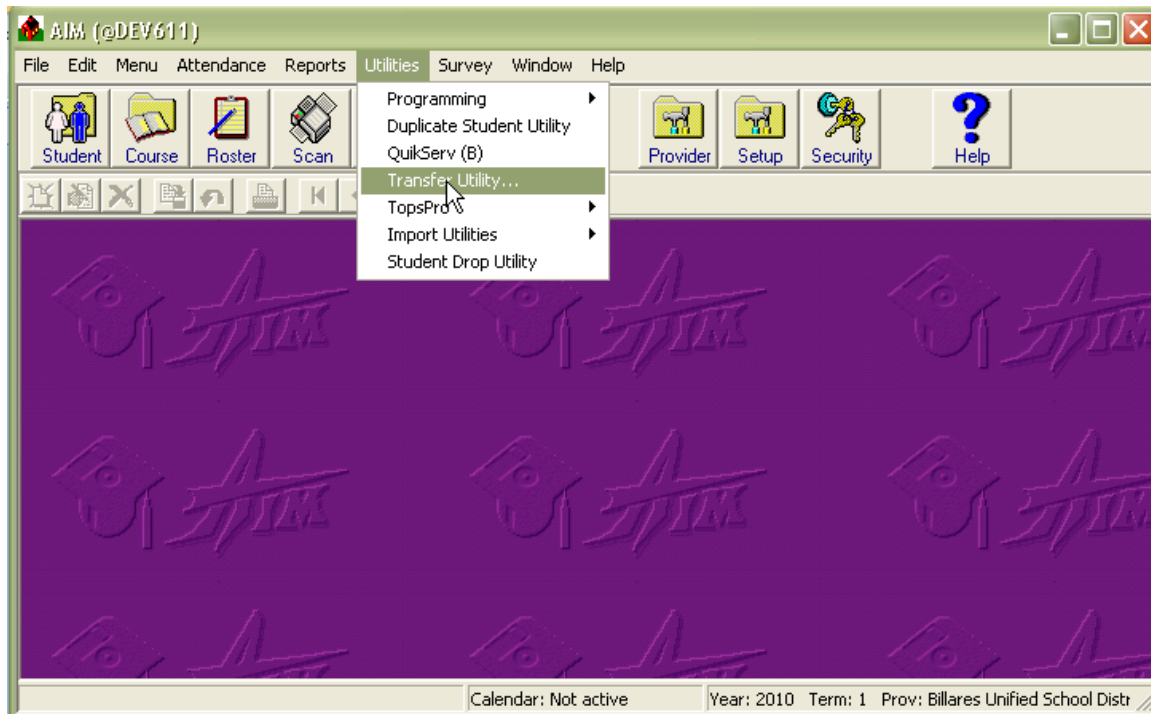
2. The "**Course/Section/Student/Competency Transfer Utility**" window will open.
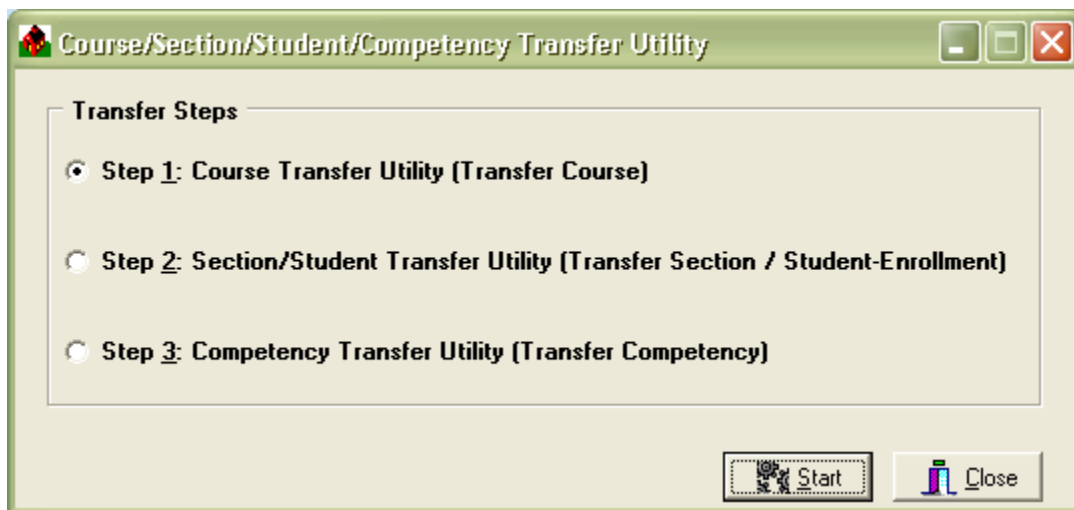
This screen is used to select the information to transfer: course, section, student, and competency. The transfer process can be performed as many times as is needed.

3. Select Step 1 for the Course Transfer.

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

Step **1:**
Course Transfer Step **1**:
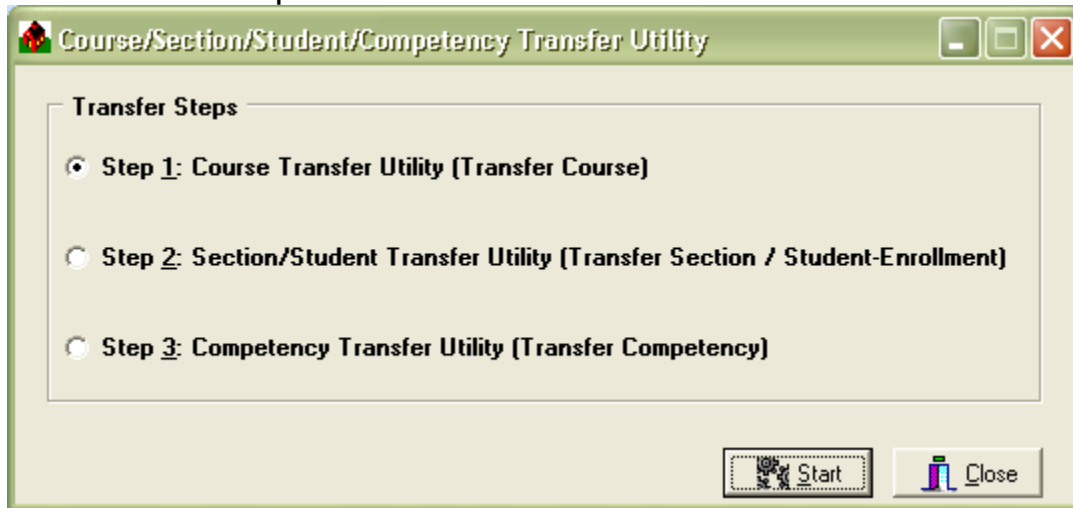
Step 1, the **Course Transfer Utility** is used to transfer the course information from one fiscal year to another fiscal year to avoid manual entry. **Courses should be transferred prior the beginning of a new school year, once a year only.** The source fiscal year and the target fiscal year must have 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.
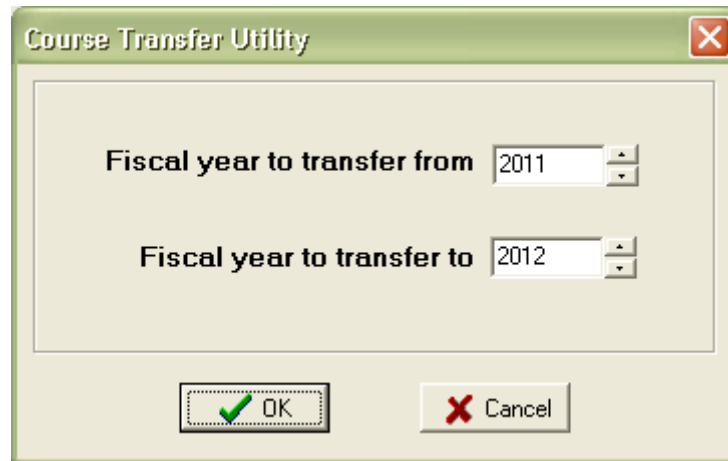
5. Click "**OK**". **The transfer will begin**.
   Do not interrupt this process.

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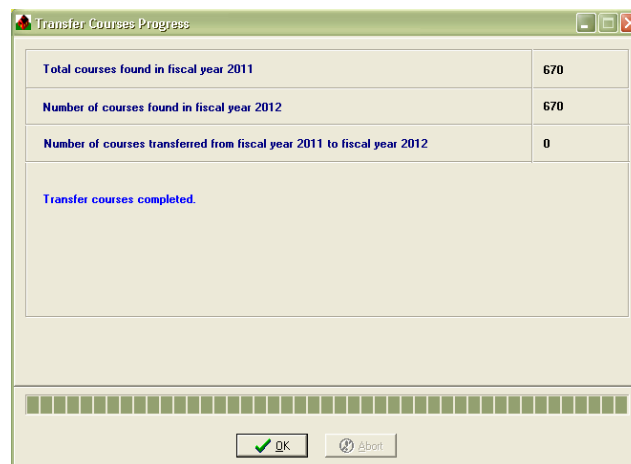
The "**Transfer Course Progress**" window will open showing the status of the transfer.

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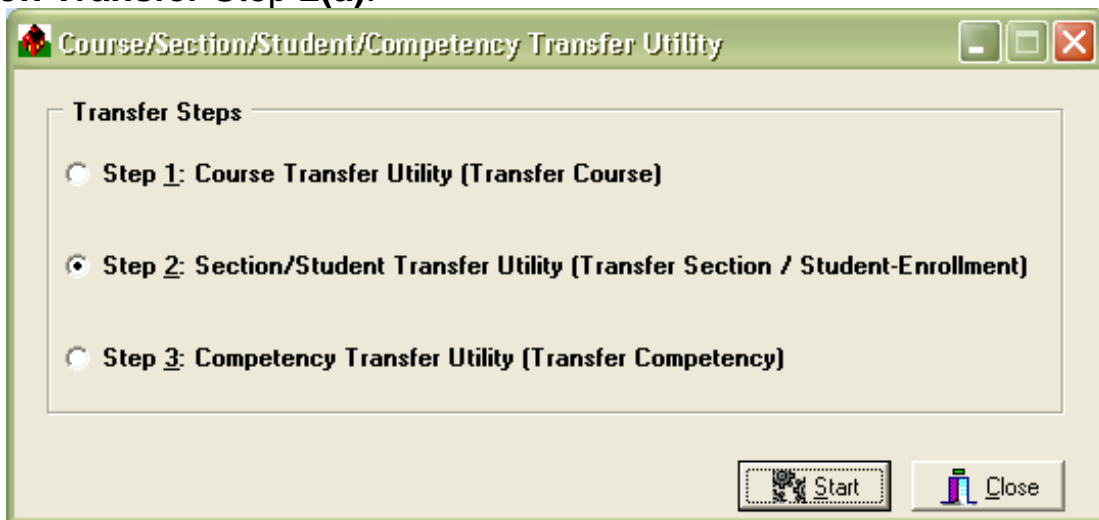
Step 2, the "**Section/Student Transfer Utility**" is used to transfer ("rollover") the section information or the student enrollment information from one fiscal year and term to another fiscal year and term for a given provider.

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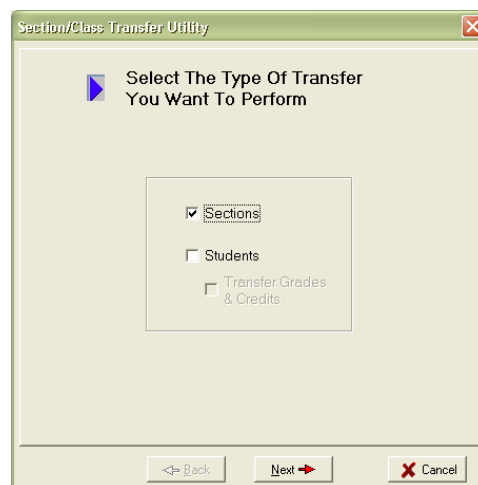
Section Transfer

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 **all** 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 or previously transferring sections).

4. 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.
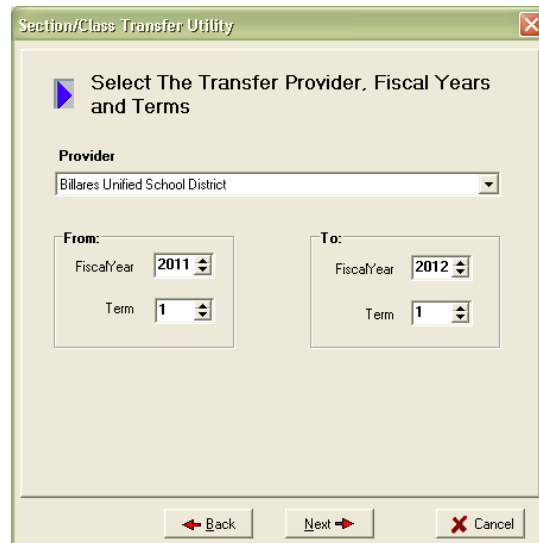
5. Click the "**Next**" button to continue with the transfer process.

The next screen is used to choose the proper method to define all the transferred sections' start and end dates in the destination term.
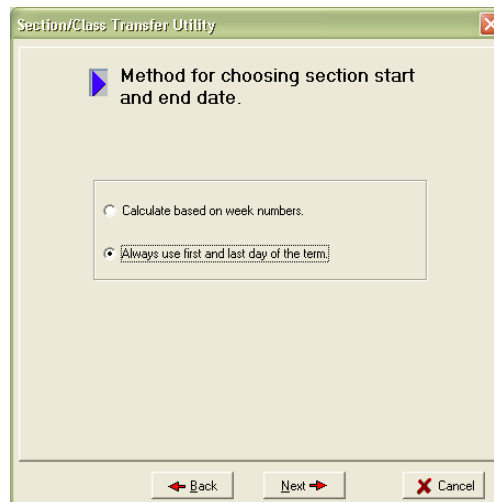
Note: It is recommended to first send the sections over selecting the "Always use first and last day of the term" method. This will avoid sections from transferring over to the new term with no dates assigned (from short terms and Override Holiday). Then take the time to check and edit those dates in 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.
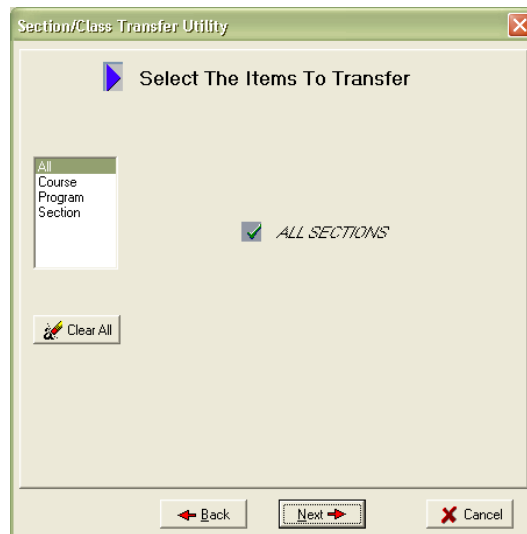
Click "**ALL**" to transfer all sections or students.
Click "**Course**" to select to transfer only the sections or student enrollments attached to one or more courses.
Click "**Program**" to transfer only the sections or student enrollment attached to one or more programs.
Click "**Section**" to transfer 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.

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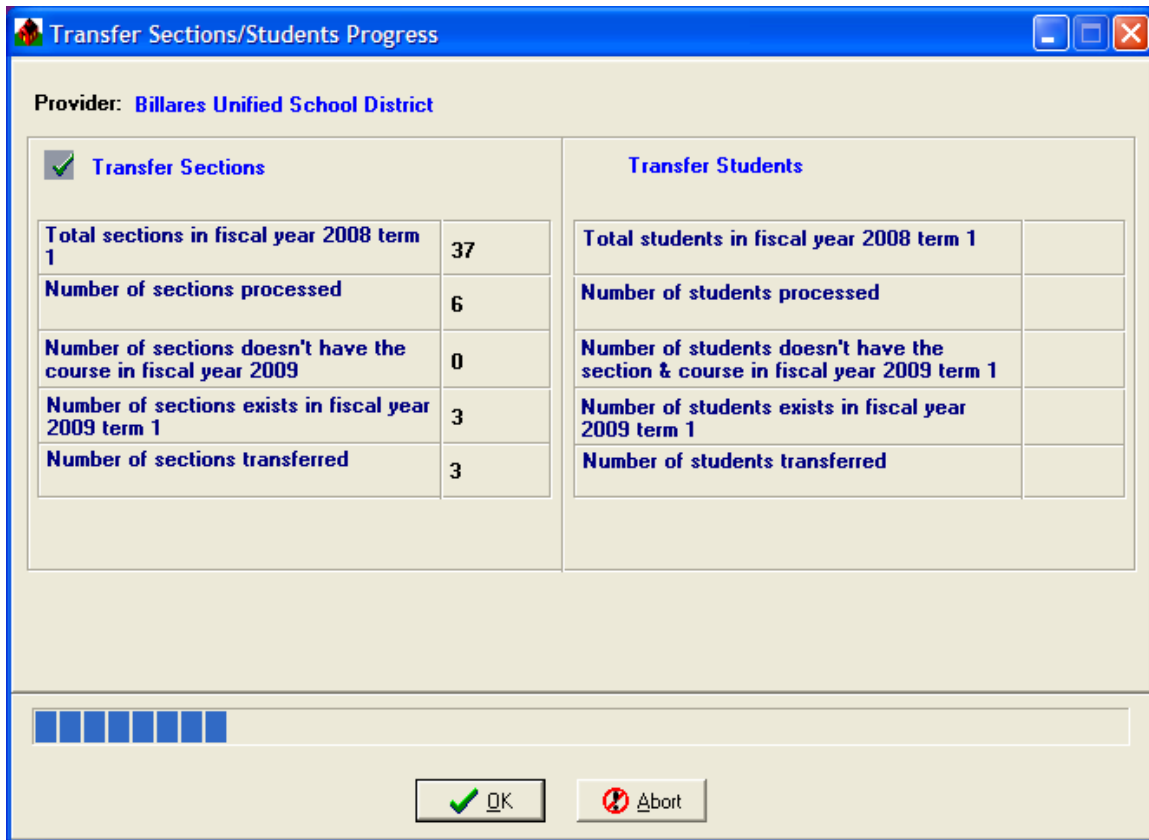
The process can be quite lengthy depending on what was selected. Wait for the process to complete. If you **must interrupt** the transfer process click the "**Abort**" button. This action can result in a partial transfer. We do not recommend that you interrupt the process.

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.

Student Transfer Step 2(b):
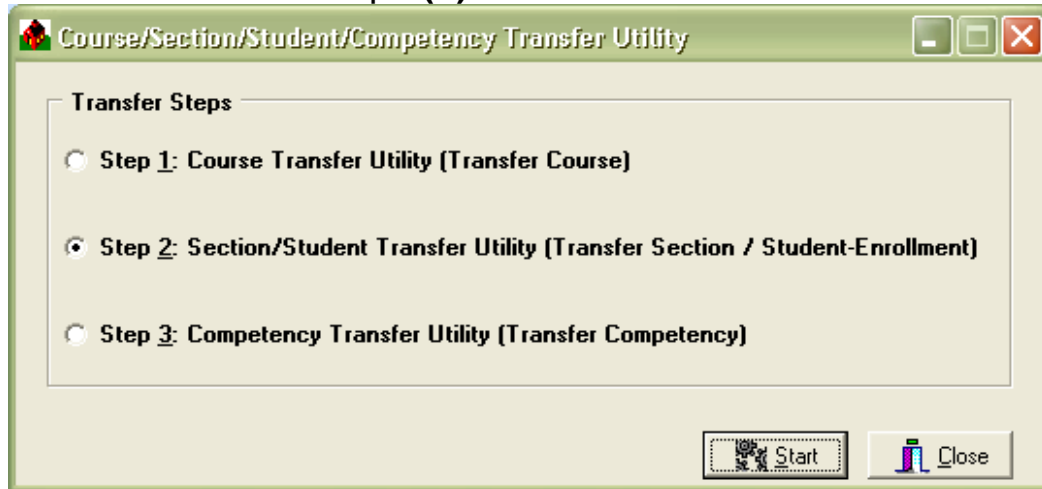
1. If you closed the Transfer Utility, open it and select Step 2 for the Section/Student Transfer.

2. Click the "**Start**" button to begin the selected process.
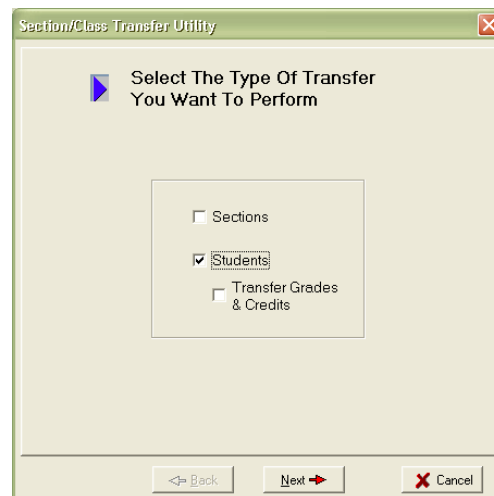
3. Click in the "Students" check box to transfer Students.
NOTE: Do not transfer "Students" unless: you have first setup sections (either by entering the sections manually <u>or</u> previously transferring sections).

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

4. 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.

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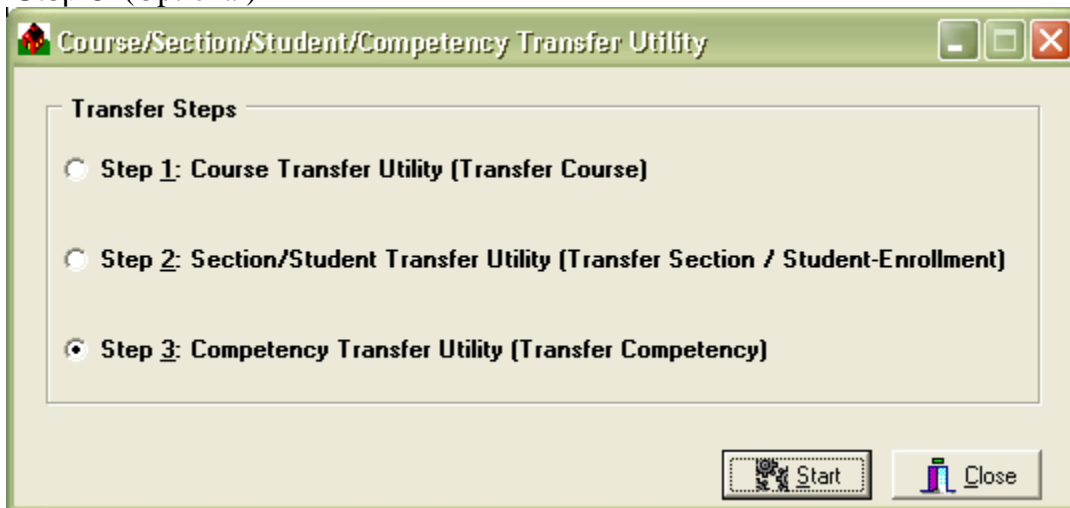
Step 3: Competency Transfer Utility is optional because has been replaced with a copy/paste procedure covered in the Competency training.