ProgressBook StudentInformation School Year Initialization Guide

StudentInformation

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(This document is current for v17.2.0 or later.)

Change Log

The following Change Log explains by Product Version, Heading, Page, and Reason where changes in the *ProgressBook StudentInformation School Year Initialization Guide* have been made.

Product Version	Heading	Page	Reason
17.2.0	*"Calendar Wizard – Periods Tab"*	23	Updated image and text to reflect new **Start Time** and **Stop Time** fields.
17.2.0	Entire Guide	N/A	Updated inactive icon.
17.1.0	*"Calendar Wizard – General Tab"*	17	Updated image and text to show new **Daily Start Time** and **Daily Stop Time** fields.
16.3.0	Entire Guide	N/A	Converted source file to FrameMaker. Updated guide to match style guide. Updated images to match new UI.

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School Year Initialization Overview

The School Year Initialization (SYI) process is typically performed in January or February to configure the following school year.

Refer to the *School Year Initialization Step by Step Checklist* for a detailed outline of the SYI process.

Understanding the School Year Initialization Module

The School Year Initialization (SYI) Tasks must be executed by these roles in this order: ITC, District, and Building. Initialization tasks are dependent on each other and you can not proceed if the dependencies are not met. Some ITC staff perform initialization at all levels on behalf of their districts. Other ITCs let their districts run the SYI tasks at the district and building level. Please consult your ITC to determine how initializations are handled.

The **Job History** screen lets you view the School Year Initialization Tasks processes and view details and errors.

The **Complete Initialization Follow-up Checklist** screen provides descriptions and instructions for School Year Initialization Tasks that have not been completed.

> *Note: The SYI process does not add students to the new school year. Consult the Student Promotion Guide and the Student Promotion Step by Step Checklist for more information on student promotion. SYI tasks must be completed at all three levels (ITC, district, building) before students can be promoted and bulk enrolled into the new school year.*
>
> *Note: Initialization is processed in a three-part procedure: Initialize the ITC level (once); Initialize the District level (once per district); and Initialize the Building level (once per building). In other words, if a district has 10 buildings, SYI needs to be completed once at the district level and at each of the 10 buildings.*
>
> *Note: The following items are not school year specific. This means that changing them in one school year changes them in all school years.*

- Rooms/Locations (**StudentInformation > Management > School Administration > School Building Administration > Rooms/Locations**)
- School Demographics (**StudentInformation > Management > School Administration > School Building Administration > School Demographics**)
- Student Demographics – i.e., student address (**StudentInformation > SIS > Student > Edit Profile**)
- Student Pictures (upload process via ITC and displayed on the **Student Profile**)

School Year Initialization Outline and Flow

1. *"School Year Initialization Tasks (ITC Level)"*

       b. *"Execute Tasks – Required Information Tab"*

       c. *"Execute Tasks – Confirmation Tab"*

       d. *"Execute Tasks – Results Tab"*

12. *"Review Job History"*

13. *"Complete Initialization Follow-up Checklist"*

14. *"Create Default Schedule Results"*

School Year Initialization Tasks (ITC Level)

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks

The Execute School Year Initialization Tasks screens contain various tasks that are necessary for setting up a new school year. Before Initialization tasks are completed by any district or building, they must first be completed at the ITC level because many tasks are dependent upon the data setup at the ITC level. You will only need to run the ITC level tasks once for the entire ITC.

> ***Note:*** *Change your current working school to the ITC and select the year you wish to initialize. Only ITC personnel have the security permissions to initialize at the ITC level.*

Manage School Status – Activate School Year

Navigation: StudentInformation > ITC > Manage School Status

A script inserts the new school year to the tblSchoolYear table. Once the new school year exists in this table, ITCs can use the **Manage School Status** screen to activate/deactivate the school year for each building, a district, or the entire ITC. The new school year needs to be activated before School Year Initialization can proceed.

Execute Tasks – Module Task List Tab

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks > Module Task List Tab

- **Do Not Execute** – Temporarily skip this task.
- **Skip** – Skip the task entirely.
- **Execute Now** – Perform this task now.

  *Note: See the **School Year Initialization Step by Step Checklist** for the order in which to execute ITC level tasks.*

- **Completed** – If the task has already been completed at this level, the **Completed** checkbox is automatically selected.
- **Student: Profile** – This task copies the code values used by the student profile. No student specific data is copied.

- **Student: Admission** – This task copies code values for Student Admission and creates Sub Calendar Entries.
- **Student: Memberships** – This task copies special education services, memberships, and membership groups.
- **Discipline** – This task copies code values for Discipline.
- **Fees** – This task copies basic fee configuration, excluding Course and Course Section fees.
- **Attendance: Absence Events** – This task copies configuration and code values used by attendance.
- **Attendance: Absence Letters** – This task copies configuration used to generate absence letters.
- **Scheduling: Course Configuration** – This task copies setup tables used by the course catalog.
- **Marks: Mark Configuration** – This task copies configuration to support Marks.
- **Course History** – This task copies code values for Transfer Status.
- **Next>** – Click to proceed to the **Required Information** tab.

Execute Tasks – Required Information Tab

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks > Required Information Tab

- **Source School Year** – Select the school year from which you wish to copy values for use in the new school year.
- **<Back** – Click to return to the **Module Task List** tab.
- **Next>** – Click to proceed to the **Confirmation** tab.

Execute Tasks – Confirmation Tab

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks > Confirmation Tab

Tasks that were selected on the **Module Task List** tab display on the **Confirmation** tab.

- **Module Name** – Displays the name of the tasks to be performed.
- **Module Description** – Displays a brief description of the module to be performed.
- **Status** – Displays the current status of each specific module: **Pending**, ⚙ (processing), **Complete**, or **Failed**.
- **<Back** – Click to return to the **Required Information** tab.
- **Execute** – Click to perform the specified tasks and proceed to the **Results** tab.

Execute Tasks – Results Tab

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks > Results Tab

The **Results** tab displays the execution results of each of the tasks selected to run.

- **Module Name** – Displays the name of the tasks to be performed.
- **Module Description** – Displays a brief description of the module to be performed.
- **Status** – Displays the results status of each specific module (**Completed** or **Failed**).

    *Note: If any of the tasks **Failed**, report them to StudentInformation State Support in a Help Desk ticket and discontinue SYI until you hear back from StudentInformation State Support.*

- **View Log** – Click to see a more detailed listing of errors on the **Initialization Job History** (View Details) screen. If you have set up any ITC level codes, you need to click **View Log** and view any informational messages to make sure the codes copied properly. If all the tasks are **Completed** and you don't have any codes set up at the ITC level, you can skip **View Log**.
- **Execute More Tasks** – Click to return to the **Module Task List** tab and perform additional tasks. Once all ITC SYI tasks are complete, you can proceed to District Level SYI.

School Year Initialization Tasks (District Level)

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks

The Execute School Year Initialization Tasks screens contain various tasks that are necessary for setting up a new school year. Before Initialization tasks are completed by building, they must first be completed at the ITC level and the District level because many tasks are dependent upon the data setup at the District Level.

> ***Note:*** *Change your current working school to a district and select the year you wish to initialize.*

Execute Tasks – Module Task List Tab

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks > Module Task List Tab

- **Do Not Execute** – Temporarily skip this task.
- **Skip** – Skip the task entirely.
- **Execute Now** – Perform this task now.

  *Note: See the **School Year Initialization Step by Step Checklist** screen for the order in which to execute District level tasks.*

- **Completed** – If the task has already been completed at this level, the **Completed** checkbox is automatically selected.
- **School: Configuration** – This task copies basic school configuration including registration defaults.

- **School: Staff Members** – This task copies staff record configuration, including teachers and counselors.
- **Student: Profile** – This task copies the code values used by the student profile. No student specific data is copied.
- **Student: Admission** – This task copies code values for Student Admission and creates Sub Calendar Entries.
- **Student: Memberships** – This task copies special education services, memberships, and membership groups.
- **Discipline** – This task copies code values for Discipline.
- **Fees** – This task copies basic fee configuration, excluding Course and Course Section fees.
- **Attendance: Absence Events** – This task copies configuration and code values used by attendance.
- **Attendance: Absence Letters** – This task copies configuration used to generate absence letters.
- **Scheduling: Course Configuration** – This task copies setup tables used by the course catalog. You cannot select to execute this task until the **Marks: Mark Configuration** task has been completed.
- **Marks: Mark Configuration** – This task copies configuration to support Marks. This task must be executed before you can select to execute the **Scheduling: Course Configuration** task.
- **Course History** – This task copies code values for Transfer Status.
- **Next>** – Click to proceed to the **Required Information** tab.

Execute Tasks – Required Information Tab

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks > Required Information Tab

- **Source School Year** – Select the school year from which you wish to copy values for use in the new school year.

- **New Locker Combination Series** (optional) – Enter a new locker combination series to be defined at the District level. Leave blank if you plan to define a new series at the Building level or retain any combination series from prior years.

- **<Back** – Click to return to the **Module Task List** tab.

- **Next>** – Click to proceed to the **Confirmation** tab.

Execute Tasks – Confirmation Tab

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks > Confirmation Tab

- **Module Name** – Displays the name of the tasks to be performed.

- **Module Description** – Displays a brief description of the module to be performed.

- **Status** – Displays the current status of each specific module: **Pending**, ⟳ (processing), **Completed**, or **Failed**.

> *Note: The **Student: Memberships** task may take a long period of time.*

- **<Back** – Click to return to the **Required Information** tab.
- **Execute** – Click to perform the specified tasks and proceed to the **Results** tab.

Execute Tasks – Results Tab

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks > Results Tab

- **Module Name** – Displays the name of the tasks to be performed.
- **Module Description** – Displays a brief description of the module to be performed.
- **Status** – Displays the results status of each specific module (**Completed** or **Failed**).

  *Note: If any of the tasks **Failed**, report them to StudentInformation State Support in a Help Desk ticket and discontinue SYI until you hear back from StudentInformation State Support.*

- **View Log** – Click to see a more detailed listing of errors on the **Initialization Job History** (View Details) screen.

- **Execute More Tasks** – Click to return to the **Module Task List** tab and perform additional tasks. Once all District SYI tasks are complete, you can proceed to Building Level SYI. If any codes have been set up at the district level, you should complete the appropriate follow-up checklist tasks. See *"Complete Initialization Follow-up Checklist"* for more information.

School Year Initialization Tasks (Building Level)

Calendar Wizard (Building Level)

Navigation: StudentInformation > Management > School Administration > School Building Administration > Calendar Wizard

Before completing initialization tasks at the Building level, you must first process the Calendar Wizard for each building. The Calendar Wizard creates the school building's master calendar, course terms, periods of the day, rotation days, and reporting terms. You must process the Calendar Wizard before the first day of the Master Schedule and before a final Schedule Result is chosen. If you need to run the Calendar Wizard again after you have run Building Level Initialization tasks, you need to re-initialize at the Building Level since the Calendar Wizard resets many initialization tasks at the Building level.

Before running the Calendar Wizard, you need the following information available for entry:

- Starting and Ending Dates of the School Year
- Starting and Ending Dates of each Reporting Period (Semester, Quarter, Trimester, etc.)
- Starting and Ending Times of each School Day
- All Course Lengths your school intends to use (3 week, 9 week, 36 week, etc.)
- Date of each School Holiday
- Date of each Parent-Teacher Conference Day
- Date of each Teacher In-Service Day or Teacher Work Day
- Date of any other day school will not be in session
- Total number of planned attendance days

   Note: *Effective for the 08/09 school year, schools are no longer required to have definitive reporting term start and stop dates, non-attending days, or even the first or last day of school before running Calendar Wizard. New functionality allows schools the ability to start scheduling before a district's school calendar has been approved. However, it is still preferred to have the district's calendar in hand when you do SYI. If fictitious dates are used to complete the Calendar Wizard, additional steps are needed to correct the dates. See the **School Year Initialization Step by Step Checklist**.*

⚠️ ***Caution:****Use extreme caution when rerunning the Calendar Wizard. Rerunning the Calendar Wizard wipes out course section assignments – this cannot be restored. One of the tasks undone by rerunning the Calendar Wizard is **Student: Admission**. All admission history and annual records are deleted. Student Promotion/Bulk Enrollment needs to be rerun. Students are searchable after Student Promotion/Bulk Enrollment is rerun. Refer to the **School Year Initialization Step by Step Checklist** – **Appendix** section for more information on rerunning the Calendar Wizard.*

When the Calendar Wizard loads, if it has been run before, the following message displays:

If you click **Cancel**, the following message displays:

The Calendar Wizard cannot be re-run once the schedule has been finalized.

In certain unique cases, when the Calendar Wizard is re-run for the same school, and school year AND course sections associated with a particular calendar master are tied to terms or schedules that belong to a different calendar master, an error occurs. The following message displays:

"Some Course Sections for Courses for the current Calendar Master are tied to Terms or Schedules that belong to other Calendar Masters. The Calendar Wizard cannot be run until the bad data has been cleaned up. Please contact StudentInformation State Support to report the problem."

Calendar Wizard – General Tab

Navigation: StudentInformation > Management > School Administration > School Building Administration > Calendar Wizard > General Tab

- **Master Calendar Code** (required) – The code for the building's Master Calendar. It is recommended that you keep the code as Master.
- **Master Calendar Name** (required) – The name for the building's Master Calendar. It is recommended that you keep the name as Master.
- **Start Date** (required) – Enter the starting date of the next school year. Make sure you have the correct year.
- **End Date** (required) – Enter the ending date of the next school year. Make sure you have the correct year.
  - If the school start date and end date have not been determined, you can guess and enter fictitious dates. These dates can be changed at a later time. Do not use Saturday or Sunday for the start or end date unless Saturday or Sunday are legitimate school days.

- **Daily Start Time** (required) – Enter the daily start time for the building's Master Calendar. You can edit this field later on the **Master Calendar** screen even after the calendar is finalized.

- **Daily Stop Time** (required) – Enter the daily stop time for the building's Master Calendar. You can edit this field later on the **Master Calendar** screen even after the calendar is finalized.

- **Instructional Weeks on which to base Calendar** – Enter the number of weeks to include in your calendar. This field defaults to 36 and can be adjusted up and down with
  ⬍. It is recommended that this number is not changed or should be between 36 and 42.

- **Attending Days** – Select the corresponding checkboxes of the days of the week school is in session. Monday through Friday are selected by default, and Saturday and Sunday are deselected by default. This is the default state of each day of the week in the Calendar result.

- **Next>** – Click to proceed to the **Reporting Terms** tab.

- **Cancel** – Click to exit the Calendar Wizard and discard changes.

Calendar Wizard – Reporting Terms Tab

Navigation: StudentInformation > Management > School Administration > School Building Administration > Calendar Wizard > Reporting Terms Tab

- **Report Card Frequency** (required) – Select your report card frequency from the drop-down list. This determines how many reporting periods the Calendar Result will have. Options are as follows: 1 Full-Year Term (36 weeks), 2 Semesters (18 weeks each), 3 Trimesters (12 weeks each), 4 Quarters (9 weeks each), 6 Heximesters (6 weeks each), or 8 Octimesters (4.5 weeks each).

- **Select Course Lengths Used** (required) – Move **all** Course Lengths you will be using in the forthcoming year to the box on the right. Only course lengths that have a common factor with the Reporting Term length greater than 1 are shown. The smallest fraction of a week allowed for a Reporting Term is 5. For instance, if most of your courses are 9 week courses, but you have a few 3 week courses, and one 4.5 week course, add 9 weeks, 3 weeks and 4.5 weeks to the box on the right. These are used to generate your Schedule Terms. For more information on Schedule Terms, see the *ProgressBook StudentInformation Scheduling Guide*.

Once you have selected a **Report Card Frequency**, more options display below the **Select Course Lengths Used** boxes. Each Reporting Period (of the number you selected from the drop-down list) has three fields.

- **Code** (required) – Enter a code, up to four characters, for each reporting term. If you want the Initialization Tasks to automatically update between years, you need to use the exact same Code for each Reporting Term (you can also manually map between different codes).

- **Name** (required) – Enter a name, up to thirty characters, for each reporting term.

- **Stop Date** (required) – The final Reporting Term fills this in by default as the Ending Date of the school year.

- **<Back** – Click to return to the **General** tab.

- **Next>** – Click to proceed to the **Virtual Terms** tab.

- **Cancel –** Click to exit the Calendar Wizard and discard changes.

Calendar Wizard – Virtual Terms Tab

Navigation: StudentInformation > Management > School Administration > School Building Administration > Calendar Wizard > Virtual Terms Tab

On this tab, choose the Virtual Reporting Terms you would like to copy over from a previous year. You can also manually add Virtual Reporting Terms.

- **Add Virtual Term** – Click to add a virtual term manually.

- **Code** – Enter a code for the new Virtual Reporting Term.
- **Name** – Enter a name for the new Virtual Reporting Term.

- **Start Date** – Displays the Start Date determined on the **General** tab.
- **Stop Date** – Displays the Stop Date determined on the **Reporting Terms** tab.
- **Sort Order** – Displays the order the Virtual Terms are sorted.
- ⬇️⬆️ – Click the appropriate up/down arrow to rearrange the order of reporting terms.
- 🗑️ – Click to delete the corresponding virtual term.
- **Copy Virtual Terms From** – Select a school year to copy Virtual Terms from the drop-down list and click **Go**.

   The terms for the selected school year display and follow the Start and Stop Dates predetermined on the **General** and **Reporting Terms** tabs.

- **<Back** – Click to return to the **Reporting Terms** tab.
- **Next>** – Click to proceed to the **Non-Attending Days** tab.
- **Cancel** – Click to exit the Calendar Wizard and discard changes.

Calendar Wizard – Non-Attending Days Tab

Navigation: StudentInformation > Management > School Administration > School Building Administration > Calendar Wizard > Non-Attending Days Tab

On this tab, enter any Holidays, Parent-Teacher Days, Teacher In-Service Days, Teacher Work Days, and any other days school will not be in session.

- **Date** (required) – Enter the date of the Non-Attending Day.

- **Thru** (optional) – Use this field to enter a range of Non-Attending Days (such as a Winter Break, or Thanksgiving).

- **Day Type** (required) – Select the Day Type for the Non-Attending Day from the drop-down list.

- **Note** (optional) – Enter any note you wish to add for the Non-Attending Day (up to thirty characters).

- **Add** – Click to add the Non-Attending Day to the grid. The grid automatically sorts by date.

- 🗑 – Click to remove the Non-Attending Day.

- **<Back** – Click to return to the **Virtual Terms** tab.

- **Next>** – Click to proceed to the **Periods** tab.

- **Cancel** – Click to exit the Calendar Wizard and discard changes.

Calendar Wizard – Periods Tab

Navigation: StudentInformation > Management > School Administration > School Building Administration > Calendar Wizard > Periods Tab

StudentInformation > Management > School Administration > School Building Administration > Calendar Wizard

Calendar Wizard

From this screen, you can initialize a new calendar using a step-by-step wizard approach.

| General | Reporting Terms | Virtual Terms | Non-Attending Days | **Periods** | Calendar Type | Projected Calendar |

ℹ️ If you would like the system to **automatically** generate the correct number of periods in the grid, please enter the number of unique periods the school uses for the calendar and select the 'Go' button. Alternatively, you can copy the master calendar periods from a selected school year.

Generate Periods: [   ] ⬍ [Go]   **Copy Periods From:** [2016-2017 ▾] [Go]

[Add Period]

[< Back] [Next >] [Cancel]

- **Generate Periods** – Enter a number or adjust with ⬍ to display an automatically-generated period grid.
  - **Go** – Click to automatically generate a period grid using the number of periods entered in the **Generate Periods** field.
- **Copy Periods From** – Select another school year from which to copy the periods, period codes, and period names for that school year.
  - **Go** – Click to generate a period grid using the data from the selected school year.
- **Add Period** – Click to add a period to the grid.

- **Code** (required) – Enter a code, up to four characters, for the period. If you want the Initialization Tasks to automatically update between years, you need to use the exact same **Code** for each period (you can also manually map between different codes).

- **Name** (required) – Enter a name for the period, up to thirty characters.

- **Start Time** (optional) – Enter the start time for the period.

- **Stop Time** (optional) – Enter the stop time for the period.

- 🗑 – Click to remove the corresponding period.

- ⬆ | ⬇ – Click the arrows to shift a period up or down in the list.

- **<Back** – Click to return to the **Non-Attending Days** tab.

- **Next>** – Click to proceed to the **Calendar Type** tab.

- **Cancel** – Click to exit the Calendar Wizard and discard changes.

Calendar Wizard – Calendar Type Tab

Navigation: StudentInformation > Management > School Administration > School Building Administration > Calendar Wizard > Calendar Type Tab

- **Calendar Type** (required) – Select the type of Calendar you wish to use: Fixed Day (all school days have the same schedule), Fixed Rotation Days (repeating sequence of days by week or weeks), or Alternating Rotation Days (repeating sequence of days, regardless of day of the week).

Fixed Day Calendar Type

Fixed Day is a standard calendar with every day's schedule being the same; for instance, a class that meets the same time each day, Monday through Friday.

- **Code** (required) – Enter a code, up to four characters, for this Day. If you want the Initialization Tasks to automatically update between years, you will need to use the exact same Code for each Day (you can also manually map between different codes).
- **Name** (required) – Enter a name for this Day, up to thirty characters.
- **<Back** – Click to return to the **Periods** tab.
- **Next>** – Click to proceed to the **Projected Calendar** tab.
- **Cancel** – Click to exit the Calendar Wizard and discard changes.

Fixed Rotation Days Calendar Type

Fixed Rotation Days is a calendar with a repeating sequence of days with different schedules, arranged by week or weeks; for instance, a class that meets only Monday, Wednesday, and Friday. You can also create rotations for more than one week, such as classes that meet Monday, Wednesday, and Friday one week, then Tuesday and Thursday the next week.

- **# of Rotation Weeks** (required) – Select the number of Rotation Weeks from the drop-down list. Options are 1 Week, 2 Weeks, or 3 Weeks.
- **Go** – Click to automatically generate a Rotation Days grid using the number of weeks selected in the **# of Rotation Weeks** field.
- **Code** (required) – Enter a code, up to four characters, for this Day. If you want the Initialization Tasks to automatically update between years, you need to use the exact same Code for each Day (you can also manually map between different codes).
- **Name** (required) – Enter a name for this Day (up to thirty characters).
- **<Back** – Click to return to the **Periods** tab.
- **Next>** – Click to proceed to the **Projected Calendar** tab.
- **Cancel** – Click to exit the Calendar Wizard and discard changes.

Alternating Rotation Days Calendar Type

Alternating Rotation Days is a calendar with a repeating sequence of days, which are independent of the days of the week. For instance, you could have Blue Days and Gold Days, that alternate each attending day, regardless of week length or the day of the week.

- **# of Alternating Days** (required) – Enter a number or adjust with ↕ to display an automatically-generated Rotation Days grid.
- **Go** – Click to automatically generate a Rotation Days grid using the number of days entered in the **# of Alternating Days** field.
- **Code** (required) – Enter a code, up to four characters, for this Day. If you want the Initialization Tasks to automatically update between years, you need to use the exact same Code for each Day (you can also manually map between different codes).
- **Name** (required) – Enter a name for this Day (up to thirty characters).
- **<Back** – Click to return to the **Periods** tab.
- **Next>** – Click to proceed to the **Projected Calendar** tab.
- **Cancel** – Click to exit the Calendar Wizard and discard changes.

Calendar Wizard – Projected Calendar Tab

Navigation: StudentInformation > Management > School Administration > School Building Administration > Calendar Wizard > Projected Calendar Tab

This tab displays the Calendar created by your options in the previous tabs.

- **Non-Attending/Attending** (view-only) – This column lists the total days for each Reporting Term and for the School Year (listed to the right of the Start Date of each Reporting Term and the School Year). The number before the slash is the total number of **Non-Attending Days**, and the number after the slash is total number of Attending Days.

  The number of days students attend school may differ from the Attending Days total, since Attending Days includes Parent-Teacher Days, Teacher In-Service Days, and Teacher Work Days.

- **<Back** – Click to return to the **Calendar Type** tab.
- **Finish** – Complete the Calendar Wizard and create a Master Calendar.
- **Cancel** – Click to exit the Calendar Wizard and discard changes.

Complete Initialization Follow-up Checklist

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Follow-up Checklist

After running tasks at each Building Level of Initialization, navigate to the **Review Initialization Follow-up Checklist** screen for a list of tasks yet to be completed.

- **Incomplete Tasks Only** – Select this checkbox to display only incomplete tasks or deselect it to show all tasks, regardless of completion status.
- **Initialization Task** – Displays the name of the task.
- **Follow-up Task** – Displays the name of the task that has not been completed.
- **Description** – Displays a brief explanation of the follow-up task.
- **Instructions** – Displays instructions on how to complete follow-up tasks.
- **Run By/On** – Displays the name, date, and time of when the initialization task was run.

- **Completed** – Displays a checkbox that is selected if a task has been completed or that is deselected if the task has not been completed.

- **Go to** link – Provides a link to the relevant screen to complete the follow-up task.

    Note: *Not all tasks apply to all levels of context.*

School Year Initialization Tasks (Building Level – First Pass)

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks

The Execute School Year Initialization Tasks screens contain various tasks that are necessary for setting up a new school year. Before Initialization tasks are completed by building, they must first be completed at the ITC level and the District level because many tasks are dependent upon the data setup when completing the tasks at the Building Level. In your first pass on Building-Level Initialization, only run the specified Initialization Tasks. Building-level initialization tasks also require the Calendar Wizard to have been run.

Note: *Change your current working school to the Building and select the year you wish to initialize.*

Execute Tasks – Module Task List Tab

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks > Module Task List Tab

1. In the first pass, only run the following tasks: School: Configuration, School: Staff Members, Student: Profile, Student: Homerooms, Student: Memberships, Discipline, Fees, Attendance: Absence Events, Attendance: Absence Letters, and Marks: Mark Configuration.

   • **Do Not Execute** – Temporarily skip this task.

   • **Skip** – Skip the task entirely.

   • **Execute Now** – Perform this task now.

   • **Completed** – If the task has already been completed at this level, the Completed checkbox is automatically selected.

   • **School: Configuration** – This task copies basic school configuration, including registration defaults.

   • **School: Staff Members** – This task copies staff record configuration, including teacher and counselors.

- **Student: Profile** – This task copies the code values used by the student profile. No student specific data is copied.
- **Student: Homerooms** – This task copies Homeroom Configuration.
- **Student: Memberships** – This task copies special education services, memberships, and membership groups.
- **Discipline** – This task copies code values for Discipline.
- **Fees** – This task copies basic fee configuration, excluding Course and Course Section fees.
- **Attendance: Absence Events** – This task copies configuration and code values used by attendance.
- **Attendance: Absence Letters** – This task copies configuration used to generate absence letters.
- **Marks: Mark Configuration** – This task copies configuration to support Marks.

Note: *For information on the remainder of the Module Names, see "School Year Initialization Tasks (Building Level – Second Pass)" and "School Year Initialization Tasks (Building Level – Third Pass)."*

2. Click **Next>** to proceed to the **Required Information** Tab.

Execute Tasks – Required Information Tab

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks > Required Information Tab

- **Source School Year** – Select the school year from which you wish to copy values for the new school year.
- **New Locker Combination Series** (optional) – Enter a new locker combination series to be defined at the District level. Leave blank if you plan to define a new series at the Building level or retain any combination series from prior years.
- **<Back** – Click to return to the **Module Task List** tab.

- **Next>** – Click to proceed to the **Confirmation** tab.

Execute Tasks – Confirmation Tab

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks > Confirmation Tab

Tasks that were selected on the **Module Task List** tab display on the **Confirmation** tab.

- **Module Name** – Displays the name of the tasks to be performed.
- **Module Description** – Displays a brief description of the module to be performed.
- **Status** – Displays the current status of each specific module: **Pending**, ⚙ (processing), **Completed**, or **Failed**.

  *Note: The **Student: Memberships** task may take a long period of time.*

- **<Back** – Click to return to the **Required Information** tab.
- **Execute** – Click to perform the specified tasks and proceed to the **Results** tab.

Execute Tasks – Results Tab

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks > Results Tab

- **Module Name** – Displays the name of the tasks to be performed.
- **Module Description** – Displays a brief description of the module to be performed.
- **Status** – Displays the results status of each specific module (**Completed** or **Failed**).
- **View Log** – Click to see a more detailed listing of errors on the **Initialization Job History** (View Details) screen.
- **Execute More Tasks** – Click to return to the **Module Task List** tab and perform additional tasks.

Review Job History

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Job History

Use the **Initialization Job History** screen to review the School Year Initialization job details and error messages.

> *Note: This Job History information, and that on the View Details page, is different for each Level of Initialization.*

- **Date Run** – Displays the date on which the job was submitted.
- **Run By** – Displays the name of the user who submitted the job in "Lastname, Firstname" format.
- **Tasks Completed** – Displays the total of all tasks successfully completed.
- **Tasks Skipped** – Displays the total of all tasks skipped for the specified job.
- **Tasks Incomplete** – Displays the total of all tasks yet to be completed for the specified job.
- **Tasks Failed** – Displays the total of all tasks that failed to complete successfully for the specified job.
- Click to view the **Initialization Job History** details screen for the specific job.

- **Include Message Types** – Select the appropriate checkbox to display **Fatal Errors**, **Non-Fatal Errors**, and/or **Informational Messages**.

  - **Fatal Errors** are represented when an entire record is not inserted because not all required elements were available. For example, when a schedule is copied and course sections are created, if a course section could not be matched to an existing course, that record would not be inserted.

  - **Non-Fatal Errors** occur when an optional field within a record could not be "translated." The example with Fees and Memberships, provided below, could generate these types of errors. The new fee record could still be inserted without the membership filter value populated.

- **Informational Messages** provide optional information, such as how many codes were copied, which database tables were affected, and so on.

Task Name: **Student: Profile**	Message Type	Table Name	Message
	Informational Message	Codes (Team)	0 code(s) updated
Task Status:	Informational Message	Codes (Team)	0 code(s) created
Completed	Informational Message	Codes (Program)	0 code(s) updated
Source Year:	Informational Message	Codes (Program)	16 code(s) created
2015	Informational Message	Codes (Attendance)	0 code(s) updated
Task Description: Copies code values to support	Informational Message	Codes (Attendance)	33 code(s) created
student profiles but no student specific data	Informational Message	Codes (StudentStatus)	0 code(s) updated
Follow-Up Actions: ☑ Student Codes	Informational Message	Codes (StudentStatus)	12 code(s) created

- **Follow-Up Actions** – Each task may have one or more Follow-Up Actions listed at the lower-left of the task detail.

  Note: These actions are vital to School Year Initialization but must be done manually for each Level of Initialization. For more information on Follow-Up Actions, see "Complete Initialization Follow-up Checklist."

- **Refresh** – Click to update the information on the screen. Use this option if you have changed the **Include Message Types** checkbox options.
- **View Jobs** – Click to return to the main **Job History** summary screen.

Complete Initialization Follow-up Checklist

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Follow-up Checklist

After running tasks **at each Building Level of Initialization**, navigate to **Review Initialization Follow-up Checklist** for a list of tasks that have not been completed.

- **Incomplete Tasks Only** – Select this checkbox to display only incomplete tasks or deselect it to show all tasks, regardless of completion status.
- **Initialization Task** – Displays the name of the task.
- **Follow-up Task** – Displays the name of the task that has not been completed.
- **Description** – Displays a brief explanation of the follow-up task.
- **Instructions** – Displays instructions on how to complete follow-up tasks.
- **Run By/On** – Displays the name, date, and time of when the initialization task was run.

- **Completed** – Displays a checkbox that is selected if a task has been completed or that is deselected if the task has not been completed.

- **Go to** link – Provides a link to the relevant screen to complete the follow-up task.

  Note: Not all tasks apply to all levels of context.

School Year Initialization Tasks (Building Level – Second Pass)

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks

The Execute School Year Initialization Tasks screens contain various tasks that are necessary for setting up a new school year. Before initialization tasks are completed by building, they must first be completed at the ITC level and the District level because many tasks are dependent upon the data setup when completing the tasks at the Building Level. Building-level initialization tasks also require the Calendar Wizard to have been run.

> *Note: Change your current working school to the Building and select the year you wish to initialize.*

Execute Tasks – Module Task List Tab

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks > Module Task List Tab

1. In the second pass, only run the following tasks: Student: Admission, Scheduling: Course Configuration, and Scheduling: Courses.

   • **Do Not Execute** – Temporarily skip this task.

   • **Skip** – Skip the task entirely.

   • **Execute Now** – Perform this task now.

   • **Completed** – If the task has already been completed at this level, the **Completed** checkbox is automatically selected.

   • **Student: Admission** – This task copies code values for Student Admission and creates Sub Calendar Entries.

   • **Scheduling: Course Configuration** – This task copies setup tables used by the course catalog.

- **Scheduling: Courses** – This task copies the course catalog, Credit Flex values, and related fees.

  Note: *For information on the remainder of the Module Names, see "School Year Initialization Tasks (Building Level – First Pass)" and "School Year Initialization Tasks (Building Level – Third Pass)."*

2. Click **Next>** to proceed to the **Required Information** tab.

Execute Tasks – Required Information Tab

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks > Required Information Tab

- **Source School Year** – Select the school year from which you wish to copy values for the new school year.
- **Source Report Terms** – Each Target Report Term has a Source Report Term assigned to it if the Reporting Term codes match exactly. Otherwise, select the appropriate Source Reporting Term or select **-- DO NOT LOAD --** for each Reporting Term.

- **Source Course Term** – Each Target Course Term has a Source Course Term assigned to it if the Course Term codes match exactly. Otherwise, select the appropriate Source Course Term or select **-- DO NOT LOAD --** for each Course Term.

- **Source Period** – Each Target Period for each school day has a Source Period assigned to it if the Period codes, Day Type, and School Day Codes all match exactly. Otherwise, select the appropriate Source Period or select **-- DO NOT LOAD --** for each period of each day.

- **<Back** – Click to return to the **Module Task List** tab.

- **Next>** – Click to proceed to the **Confirmation** tab.

Execute Tasks – Confirmation Tab

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks > Confirmation Tab

Tasks that were selected on the **Module Task List** tab display on the **Confirmation** tab.

- **Module Name** – Displays the name of the tasks to be performed.

- **Module Description** – Displays a brief description of the module to be performed.

- **Status** – Displays the current status of each specific module: **Pending**, ⚙ (processing), **Completed**, or **Failed**.

   *Note: The **Scheduling: Schedule** task may take a long period of time.*

- **<Back** – Click to return to the **Required Information** tab.

- **Execute** – Click to perform the specified tasks and proceed to the **Results** tab.

Execute Tasks – Results Tab

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks > Results Tab

- **Module Name** – Displays the name of the tasks to be performed.
- **Module Description** – Displays a brief description of the module to be performed.
- **Status** – Displays the results status of each specific module (**Completed** or **Failed**).
- **View Log** – Click to see a more detailed listing of errors on the **Initialization Job History** (View Details) screen.
- **Execute More Tasks** – Click to return to the **Module Task List** tab and perform additional tasks.

Review Job History

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Job History

Use the **Initialization Job History** screen to review the School Year Initialization job details and error messages.

> *Note: This Job History information, and that on the View Details page, is different for each Level of Initialization.*

- **Date Run** – Displays the date on which the job was submitted.
- **Run By** – Displays the name of the user who submitted the job in "Lastname, Firstname" format.
- **Tasks Completed** – Displays the total of all tasks successfully completed.
- **Tasks Skipped** – Displays the total of all tasks skipped for the specified job.
- **Tasks Incomplete** – Displays the total of all tasks yet to be completed for the specified job.
- **Tasks Failed** – Displays the total of all tasks that failed to complete successfully for the specified job.
- Click 🔍 to view the **Initialization Job History** details screen for the specific job.

- **Include Message Types** – Select the appropriate checkbox to display **Fatal Errors**, **Non-Fatal Errors**, and/or **Informational Messages**.

  - **Fatal Errors** are represented when an entire record is not inserted because not all required elements were available. For example, when a schedule is copied and course sections are created, if a course section could not be matched to an existing course, that record would not be inserted.

  - **Non-Fatal Errors** occur when an optional field within a record could not be "translated." The example with Fees and Memberships, provided below, could generate these types of errors. The new fee record could still be inserted without the membership filter value populated.

- **Informational Messages** provide optional information, such as how many codes were copied, which database tables were affected, and so on.

Task Name:	Message Type	Table Name	Message
Student: Profile	Informational Message	Codes (Team)	0 code(s) updated
	Informational Message	Codes (Team)	0 code(s) created
Task Status: Completed	Informational Message	Codes (Program)	0 code(s) updated
	Informational Message	Codes (Program)	16 code(s) created
Source Year: 2015	Informational Message	Codes (Attendance)	0 code(s) updated
Task Description: Copies code values to support student profiles but no student specific data	Informational Message	Codes (Attendance)	33 code(s) created
	Informational Message	Codes (StudentStatus)	0 code(s) updated
Follow-Up Actions: ☑ Student Codes	Informational Message	Codes (StudentStatus)	12 code(s) created

- **Follow-Up Actions** – Each task may have one or more Follow-Up Actions listed at the lower-left of the task detail.

  Note: These actions are vital to School Year Initialization, but must be done manually for each Level of Initialization. For more information on Follow-Up Actions, see "Complete Initialization Follow-up Checklist."

- **Refresh** – Click to update the information on the screen. Use this option if you have changed the **Include Message Types** checkbox options.
- **View Jobs** – Click to return to the main **Job History** summary screen.

Complete Initialization Follow-up Checklist

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Follow-up Checklist

After running tasks at each Building Level of Initialization, navigate to **Review Initialization Follow-up Checklist** for a list of tasks that have not been completed.

- **Incomplete Tasks Only** – Select this checkbox to display only incomplete tasks or deselect it to show all tasks, regardless of completion status.
- **Initialization Task** – Displays the name of the task.
- **Follow-up Task** – Displays the name of the task that has not been completed.
- **Description** – Displays a brief explanation of the follow-up task.
- **Instructions** – Displays instructions on how to complete follow-up tasks.
- **Run By/On** – Displays the name, date, and time of when the initialization task was run.

- **Completed** – Displays a checkbox that is selected if a task has been completed or that is deselected if the task has not been completed.

- **Go to** link – Provides a link to the relevant screen to complete the follow-up task.

   Note: *Not all tasks apply to all levels of context.*

School Year Initialization Tasks (Building Level – Third Pass)

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks

The Execute School Year Initialization Tasks screens contain various tasks that are necessary for setting up a new school year. Before the remaining tasks are completed by building, they must first be completed at the ITC level and the District level because many tasks are dependent upon the data setup when completing the tasks at the Building Level. Building-level initialization tasks also require the Calendar Wizard to have been run.

   Note: *Change your current working school to the Building and select the year you wish to initialize.*

Execute Tasks – Module Task List Tab

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks > Module Task List Tab

1. In the third pass, only run the following tasks: Fee Proration, Scheduling: Schedule, Marks: Marking Patterns, Marks: GPAs, Marks: Honor Rolls and Course History.

   - **Do Not Execute** – Temporarily skip this task.
   - **Skip** – Skip the task entirely.
   - **Execute Now** – Perform this task now.
   - **Completed** – If the task has already been completed at this level, the **Completed** checkbox is automatically selected.
   - **Fee Proration –** This task copies fee prorations and proration details.
   - **Scheduling: Schedule** – This task copies course sections and the related fees from an existing schedule into a new schedule. StudentInformation copies course information, such as course section ID, staff ID, teacher name, location, start date, and end date periods. The initial Teacher History records in the new school year are created from the Meeting Time records of the current school year.

- **Marks: Marking Patterns** – This task copies code values for Marking Patterns.
- **Marks: GPAs** – This task copies configuration used to calculate GPAs.
- **Marks: Honor Rolls** – This task copies configuration used to support Honor Rolls.
- **Course History** – This task copies code values for Transfer Status.

Note: For information on the remainder of the Module Names, see "School Year Initialization Tasks (Building Level – First Pass)" and "School Year Initialization Tasks (Building Level – Second Pass)."

2. Click **Next>** to proceed to the **Required Information** tab.

Execute Tasks – Required Information Tab

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks > Required Information Tab

- **Source School Year** – Select the school year from which you wish to copy values for the new school year.
- **Source Report Terms** – Each Target Report Term has a Source Report Term assigned to it if the Reporting Term codes match exactly. Otherwise, select the appropriate Source Reporting Term or select **-- DO NOT LOAD --** for each Reporting Term.

- **Source Course Term** – Each Target Course Term has a Source Course Term assigned to it if the Course Term codes match exactly. Otherwise, select the appropriate Source Course Term or select **-- DO NOT LOAD --** for each Course Term.

- **Source Period** – Each Target Period for each school day has a Source Period assigned to it if the Period codes, Day Type, and School Day Codes all match exactly. Otherwise, select the appropriate Source Period or select **-- DO NOT LOAD --** for each period of each day.

- **<Back** – Click to return to the **Module Task List** tab.

- **Next>** – Click to proceed to the **Confirmation** tab.

Execute Tasks – Confirmation Tab

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks > Confirmation Tab

Tasks that were selected on the **Module Task List** tab display on the **Confirmation** tab.

- **Module Name** – Displays the name of the tasks to be performed.

- **Module Description** – Displays a brief description of the module to be performed.

- **Status** – Displays the current status of each specific module: **Pending**, ⚙ (processing), **Completed**, or **Failed**.

  *Note: The **Scheduling: Schedule** task may take a long period of time.*

- **<Back** – Click to return to the **Required Information** tab.

- **Execute** – Click to perform the specified tasks and proceed to the **Results** tab.

Execute Tasks – Results Tab

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Execute Tasks > Results Tab

- **Module Name** – Displays the name of the tasks to be performed.
- **Module Description** – Displays a brief description of the module to be performed.
- **Status** – Displays the results status of each specific module (**Completed** or **Failed**).
- **View Log** – Click to see a more detailed listing of errors on the **Initialization Job History** (View Details) screen.
- **Execute More Tasks** – Click to return to the **Module Task List** tab and perform additional tasks.

Review Job History

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Job History

Use the **Initialization Job History** screen to review the School Year Initialization job details and error messages.

> *Note: This Job History information, and that on the View Details page, is different for each Level of Initialization.*

	Date Run	Run By	Tasks Completed	Tasks Skipped	Tasks Incomplete	Tasks Failed
🔍	12/27/2016 02:59 PM		10	0	0	0
🔍	10/10/2016 11:41 AM		2	0	0	0

StudentInformation > Management > School Administration > School Year Initialization > Job History

Initialization Job History

This page allows you to review previous executions of School Year Initialization tasks.

- **Date Run** – Displays the date on which the job was submitted.
- **Run By** – Displays the name of the user who submitted the job in "Lastname, Firstname" format.
- **Tasks Completed** – Displays the total of all tasks successfully completed.
- **Tasks Skipped** – Displays the total of all tasks skipped for the specified job.
- **Tasks Incomplete** – Displays the total of all tasks yet to be completed for the specified job.
- **Tasks Failed** – Displays the total of all tasks that failed to complete successfully for the specified job.
- Click 🔍 to view the **Initialization Job History** details screen for the specific job.

- **Include Message Types** – Select the appropriate checkbox to display **Fatal Errors**, **Non-Fatal Errors**, and/or **Informational Messages**.

  - **Fatal Errors** are represented when an entire record is not inserted because not all required elements were available. For example, when a schedule is copied and course sections are created, if a course section could not be matched to an existing course, that record would not be inserted.

  - **Non-Fatal Errors** occur when an optional field within a record could not be "translated." The example with Fees and Memberships, provided below, could generate these types of errors. The new fee record could still be inserted without the membership filter value populated.

- **Informational Messages** provide optional information, such as how many codes were copied, which database tables were affected, and so on.

Task Name: **Student: Profile** Task Status: Completed Source Year: **2015** Task Description: Copies code values to support student profiles but no student specific data Follow-Up Actions: ☑ Student Codes	**Message Type**	**Table Name**	**Message**
	Informational Message	Codes (Team)	0 code(s) updated
	Informational Message	Codes (Team)	0 code(s) created
	Informational Message	Codes (Program)	0 code(s) updated
	Informational Message	Codes (Program)	16 code(s) created
	Informational Message	Codes (Attendance)	0 code(s) updated
	Informational Message	Codes (Attendance)	33 code(s) created
	Informational Message	Codes (StudentStatus)	0 code(s) updated
	Informational Message	Codes (StudentStatus)	12 code(s) created

- **Follow-Up Actions** – Each task may have one or more Follow-Up Actions listed at the lower-left of the task detail.

  Note: These actions are vital to School Year Initialization, but must be done manually for each Level of Initialization. For more information on Follow-Up Actions, see "Complete Initialization Follow-up Checklist."

- **Refresh** – Click to update the information on the screen. Use this option if you have changed the **Include Message Types** checkbox options.
- **View Jobs** – Click to return to the main **Job History** summary screen.

Complete Initialization Follow-up Checklist

Navigation: StudentInformation > Management > School Administration > School Year Initialization > Follow-up Checklist

After running tasks at each Building Level of Initialization, navigate to **Review Initialization Follow-up Checklist** for a list of tasks that have not been completed.

- **Incomplete Tasks Only** – Select this checkbox to display only incomplete tasks or deselect it to show all tasks, regardless of completion status.
- **Initialization Task** – Displays the name of the task.
- **Follow-up Task** – Displays the name of the task that has not been completed.
- **Description** – Displays a brief explanation of the follow-up task.
- **Instructions** – Displays instructions on how to complete follow-up tasks.
- **Run By/On** – Displays the name, date, and time of when the initialization task was run.

- **Completed** – Displays a checkbox that is selected if a task has been completed or that is deselected if the task has not been completed.

- **Go to** link – Provides a link to the relevant screen to complete the follow-up task.

   Note: *Not all tasks apply to all levels of context.*

Create Default Schedule Results

Navigation: StudentInformation > Management > School Administration > Scheduling Administration > Scheduler > Schedule Result Sets

Create a schedule result set using the name Default Schedule Result. Refer to the *ProgressBook StudentInformation Scheduling Guide* for more information.