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Connect

Report

Success

Record

**Preparing for a Successful Semester Switch**

 *An important note:* Your imports contain student registrations specific to a term, the timing between changing your Term Code and importing your registrations is important.

**Checklist**

* **IT needs to update the Student and Course Files to your server or the SFTP site**
	+ If it is for the first time or have made any changes to the files, then IT will need to send Redrock a sample file to create or update your import script.
* **Change Term Number**
	+ As a SysAdmin- Go to the Trac Navigation -> Tracman Icon -> Utilities and Prefs -> System Prefs Tab -> CurrentTerm -> Change to the new term number -> Save.

\*The term number will always be in numeric format (i.e 201710, 1710) \*

* **Change Semester Dates**
	+ As a SysAdmin- Go to the Trac Navigation -> Tracman Icon -> Utilities and Prefs -> System Prefs Tab -> SemesterStart/ SemesterEnd -> Change to the new semester start and end date -> Save.

\*SemesterStart/ SemesterEnd date format is MM/DD/YYYY\*

* **Run the import**
	+ As a SysAdmin- Go to the Trac Navigation -> Tracman Icon -> Utilities and Prefs -> Custom Utility Tab -> Standard -> Import Student Data -> Execute.
* **To confirm the import finished**
	+ As a SysAdmin- Go to the Trac Navigation -> Tracman Icon -> Utilities and Prefs -> Custom Utility Tab -> Standard -> View Import Status -> Execute.
* **Globally Activate Sections**
	+ As a Center Profile Admin- Go to the Trac Navigation -> Search Glass -> Center Profile -> click on your Profile -> Sections Tab -> List Options -> Activate These…

\*That will check the box to the left of the Section Term ID\*

* **Activate Sections per Subcenter**
	+ You have two options to add the sections to your subcenter.
		- First Option is to add ALL the sections to ALL Subcenters. As a Center Profile Admin- Go to the Trac Navigation -> Search Glass -> Center Profile -> click on your Profile -> Sections Tab -> List Options -> Click on Subcenter Activation -> Choose 'activate' or 'deactivate' and select the centers for which you would like add the all the sections to -> click on Continue.
		- Second Option is to add designated sections to a specific Subcenter. As a Center Profile Admin- Go to the Trac Navigation -> Search Glass -> Center Profile -> click on your Profile -> Sections Tab -> Subcenter Options -> Click on the subcenter name -> Check box in the middle box to activate the sections one by one.

\*Following option one or two will check the box to the right of the Section Term ID\*



* **Consultant Specialties**
	+ As a Center Profile Admin to add new sections or manually to your consultants- Go to the Trac Navigation -> Search Glass -> Center Profile -> Click on your Profile -> Consultants Tab -> Select consultants name-> Section Specialties Tab -> Search for the sections the consultant can meet with a student -> Check box to activate the sections -> Save.
	+ As a SysAdmin to copy the consultant specialties from previous term to the new term- Go to the Trac Navigation -> Tracman Icon -> Utilities and Prefs -> Custom Utility Tab-> Standard -> Copy Specialties -> Add the previous Term and the current term -> Execute.
* **Reset Center Status**
	+ First Step as a SysAdmin - Go to the Trac Navigation -> Tracman Icon -> Utilities and Prefs -> Custom Utility -> Standard -> Reset Center Status/Missed -> Check the boxes “Reset Total Missed Count” and “Set Center Status to (leave blank)”-> Execute.
	+ Second Step as a Center Profile Admin - Go to the Trac Navigation -> Search Glass -> Center Profile -> Click on you Profile -> Prefs Tab -> Scheduling Tab -> change the date in “Student max missed:” -> Save.
	+ Third Step as a SysAdmin - Go to the Trac Navigation -> Search Glass -> Students -> List Options -> Search for “Inactive” Students -> Then go to the Trac Navigation -> Tracman Icon -> Utilities and Prefs -> Change Value -> Field: “Special Status”-> Value: (Blank) or Active -> Execute.
* **Other Settings - Max Appointment Rule**
	+ As a Center Profile Admin - Go to the Trac Navigation -> Search Glass -> Center Profile -> Click on your Profile -> Prefs Tab -> Scheduling Tab -> Max Appointment Rules -> Update any date that is using the preference -> Save.
* **Other Settings - Other Scheduling Block**
	+ As a Center Profile Admin - Go to the Trac Navigation -> Search Glass -> Center Profile -> Click on your Profile -> Prefs Tab -> Scheduling Tab -> Other Scheduling Block -> Update any date that is using the preference -> Save.

