**** ****

Connect

Report

Success

Record

**10 Steps to Prepare for a New Semester**

*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.

**STEP ONE: 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.

**STEP TWO: 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 201810, 1810) \*

**STEP THREE: 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\*

**STEP FOUR: Run the import**

* + As a SysAdmin- Go to the Trac Navigation -> Tracman Icon -> Utilities and Prefs -> Custom Utility Tab -> Standard -> Import Student Data -> Execute.

**STEP FIVE: 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.

**STEP SIX: 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\*

**STEP SEVEN: 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\*

**STEP EIGHT: Consultant Specialties**

* + As a Center Profile Admin to add new sections 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.

**STEP NINE: 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.

**STEP TEN: 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 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.

