

T4: Tracks Year End with Dr. Download and SUU

Agenda

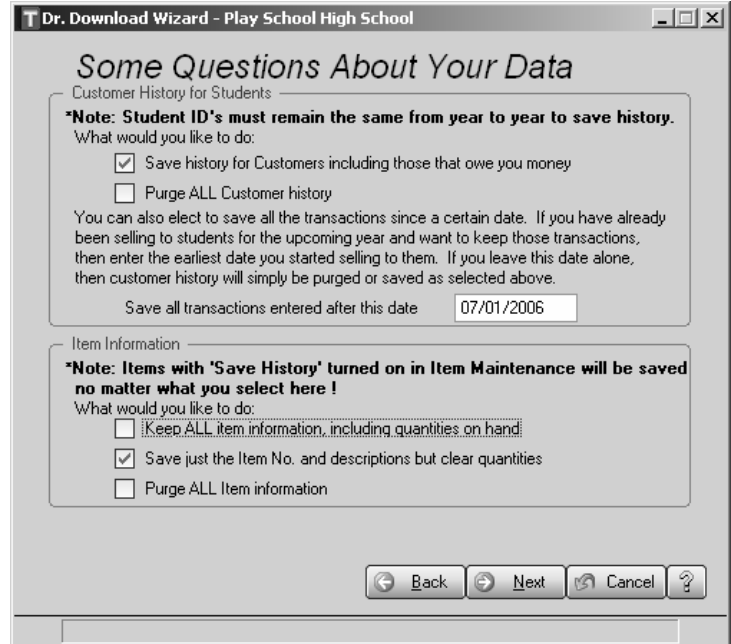
1. Saving Prior Year Data
 2. Creating a student data file for importing
 3. Using Dr. Download
 4. Tracks Year End Procedures
 5. Using Student Update Utility
 6. Importing Student Pictures
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1. Saving prior year data – Management\Special Functions.
 - a. This utility creates a complete copy of your data as it stands right now and saves that information in a new school for easy access. If you need to see sales information from last year, simply Change Schools to your prior year school and view what you want.
 - b. Automatically marks the prior year school as “read only.” Go to Management\Customize\School Settings – Integration tab.
 - c. Tracks prompts you to save Prior Year Data before you do Dr. Download.
 2. Creating a student data disk from your student information system – See Tech Tip 116 for file format.
 - a. Additional Data Fields are optional. Only include fields you want in your database.
 1. Social Security Number.
 2. Driver’s License.
 3. Demerits.
 4. GPA.
 5. E-mail Addresses – if you want to e-mail form letters:
 - i. Student
 - ii. Mother/Guardian
 - iii. Father/Guardian
 3. Running Dr. Download – on the Management\Special Functions menu.
 - a. Before running Dr. Download, make a backup for safe keeping.
 - b. If you get a message “You have Items with ‘Save History’ turned on,” you should cancel Dr. Download and check your Items to make sure you have only selected this option for appropriate and necessary Items.
 - c. COMING: Ability to mark items used for “pre-registration” so you don’t lose sales history.
 - d. Walking through the Dr. Download Wizard.
 1. Get your student data. The student file may be formatted as a .txt, .csv or .dat file without column headers. Browse to find your file.
 2. Mapping the fields.

- i. Field is designated by a yellow highlight.
- ii. Moving the field guide using the “Move Field Right” or “Move Field Left” buttons.
- iii. Use buttons to “Make Field Bigger” or “Make Field Smaller.”
- iv. Moving quickly using the faster buttons.
- v. Not using the field? Make the field smaller until yellow is gone.



3. Checking your data.
 - i. Make sure all fields are correct before proceeding.
 - ii. Check several students with “Previous” and “Forward” buttons.
 - iii. If not correct, use the “Map Fields” button to map the fields again.

4. Save, Keep or Purge.
 - a. Dr. Download is already set for the normal defaults.
 - b. Customer History – You will only want to “Save” customer history from the beginning of the new school year on, so set your date for 07/01/06.

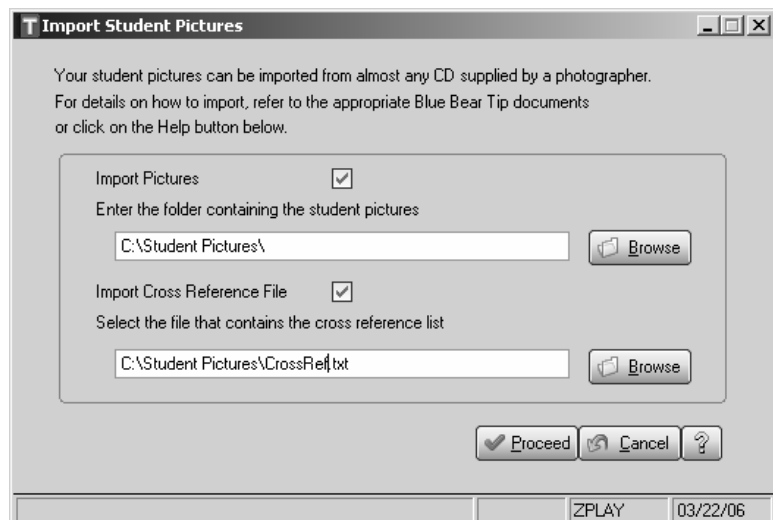


- c. Item Information – You will want to “Save” your inventory information unless you don’t want to keep your inventory totals or you want to change all your item numbers for some reason.
 - d. Club Information – You will want to “Save” your club information.
 - e. Vehicle Data – You will most likely want to “Purge” this data. Remember that you will have a prior year school to go back to if you need to see data from last year.
 5. Double check your choices and print them. Save these with your other year end reports.
 6. Make your backup. You should always have a backup (on separate media) of your school year IN ADDITION TO THE SAVE PRIOR YEAR DATA SCHOOL. Keep the backup disk with your Dr. Download printout and other year end reports.
 7. Finish.
4. Tracks year end procedures
 - Complete all transactions.
 - Perform final Closeout.
 - Perform Daily Data Backup.
 - Save Prior Year data (see instruction sheet Tracks [Support Tip TR 121](#)).

- Purge Fundraiser History (Management, Special Functions, Fundraiser History Purge).
- Obtain download of Student Data from your Student Information System (see instruction sheet Tracks [Support Tip 116](#)).
- Perform Dr. Download Annual Student Update (see instruction sheet Tracks [Support Tip 115](#)).
- As needed, perform the Student Update Utility (SUU) using new student data to update/refresh Tracks Customer file.

Note: Once a Year End Closeout is completed, you will not be able to perform any transactions in the prior year. Why? Because prior year data is saved in a “Read Only” format which allows you to reprint reports and receipts only. You are not permitted to complete any transactions in the Work Screen nor make any changes in the prior year data.

5. Running Student Update Utility – Modules\Student Update Utility.
 - a. Included as a standard part of the Tracks program.
 - b. Create a new student data disk just before registration or start of school to update any new information. You can run SUU anytime you wish – 3 times a day, once a week, twice a month. The goal is to keep your student database in Tracks as current as possible.
6. Importing student pictures – Management\Special Functions\Import Student Pictures
 - a. Must have two separate folders/files:
 1. Student picture folder.
 2. Cross reference file (generally a text file with extension “.txt”) that tells which picture belongs to which student.



NOTES:
