

Tracks – T4

**Year End with Dr. Download
and
Student Update Utility**



CONNECTIONS 2007



Agenda

- Tracks Year End Procedures
- Saving Prior Year Data
- Creating a Student Data File
- Using Dr. Download
- Using Student Update Utility
- Importing Student Pictures



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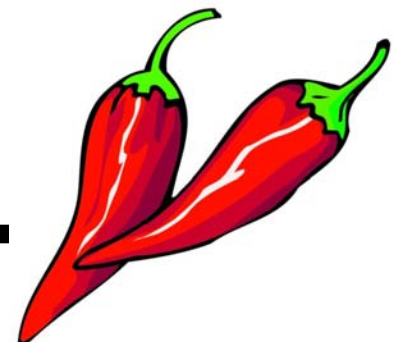


Tracks Year End Procedures

- Complete all transactions.
- Perform final Closeout.
- Perform Daily Data Backup.
- Save Prior Year data ([Support Tip 121](#)).
- Purge FundRaiser History (Management, Special Functions, FundRaiser History Purge).



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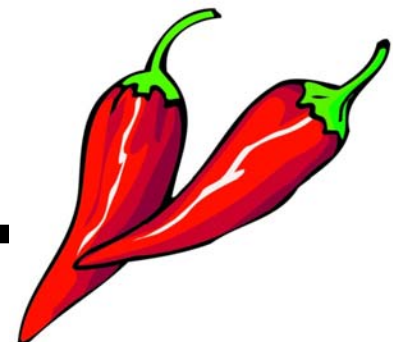


Year End Procedures (cont'd)

- Get download of Student Data from your Student Information System ([Support Tip 116](#)).
- Perform Dr. Download Annual Student Update ([Support Tip 115](#)).
- As needed, perform the Student Update Utility (SUU) using new student data to update/refresh Tracks Customer file.
- All Support Tips can be found on our website: www.bluebearsoft.com.

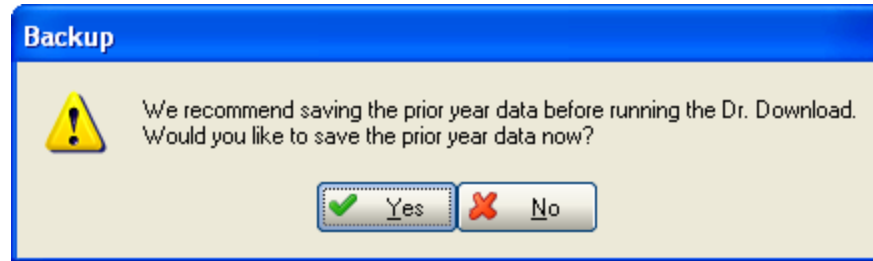


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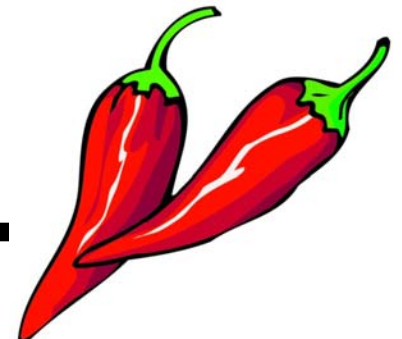
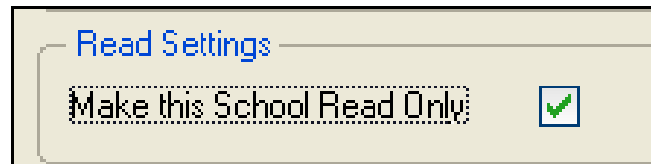


Saving Prior Year Data

- Tracks prompts you to save Prior Year data when you do Dr. Download.



- This creates a complete copy of your data as of right now in a separate school for you to access.
- Automatically marks the prior year school as “Read-Only.”

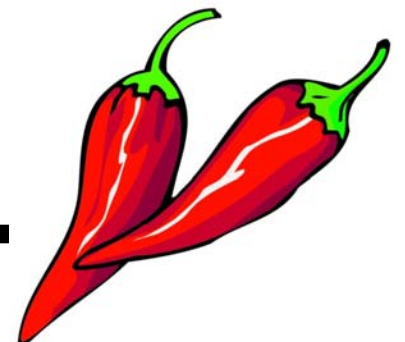


Dr. Download – What Does It Do?

- Creates a “Prior Year” School
- Creates a backup of the data
- Updates the Customer file
- Purges data – Customers, Items, Vehicles, Hours, etc...
- Rollover of New School Year



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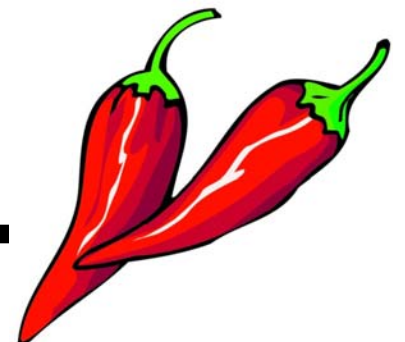
Dr. Download – What you do

What do you need?

- Diskette(s) or any other data storage device
- Data file with complete Student Database for the New/Incoming School Year (see Tracks [Support Tip 116](#))
- About 30 minutes of free time



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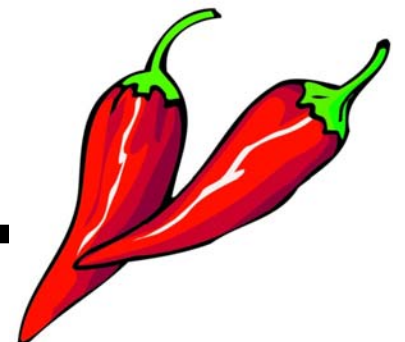
Creating a Student Data File

- **File Types:**

- **SDF** (concatenated fixed-length fields, no commas between fields, records separated by CR/LF).
- **Quote-comma delimited** (data in quotes, separated by comma, records separated by CR/LF).
- **Tab delimited** (data separated by tabs, records separated by CR/LF).
- File format must end with either .txt, .dat or .csv extension.

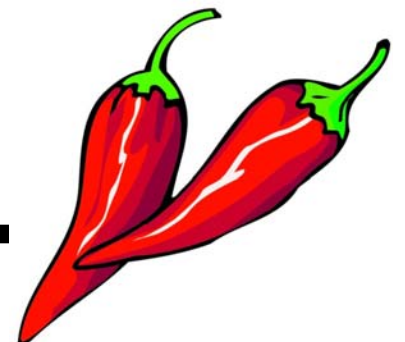


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Student Data – Additional Fields

- Optional Fields
 - Status (Active/Withdrawn)
 - Social Security Number
 - Driver's License
 - Demerits
 - GPA
 - UDFs (User Defined Fields)
 - E-mail Addresses – if you want to e-mail form letters:
 - Student
 - Mother/Guardian
 - Father/Guardian

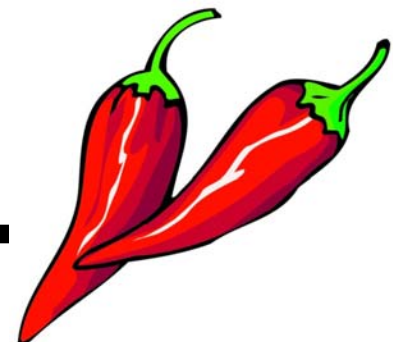


Running Dr. Download

- On the Management\Special Functions menu.
- Before running Dr. Download, make a backup for safe keeping.
- 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.
- Use this to mark items used for “pre-registration” so you don’t lose sales history.



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Mapping the fields

- Field is designated by a yellow highlight.

Dr. Download - Map Fields - Play School High School

Dr. Download Map Fields Wizard

This screen lets you choose or correct where the fields are in your student data.
Use the buttons to select fields to map, move them or change their size so they match your data.

Student Data Fields

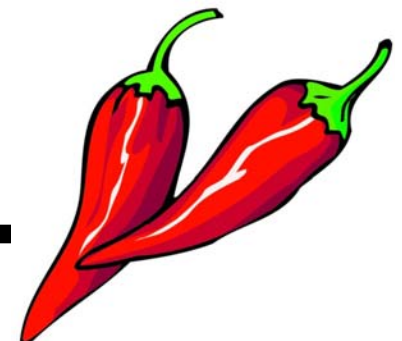
Primary Student ID Number

File Data Display

7103229	Brianna	Abelsen	133 Ave Barc
7350779	Tavaurus	Abram	350 B Fegan
7120766	Rabee	Abujudeh	26991 Calle
7121877	Christine	Ace	430 Plaza Es
7108297	Elora	Ackerman	28112 Maripo
7118742	Amy	Adams	2039 Via Vin
7131925	Aunjel	Adams	24731 Camari

Field position = 1 size = 8

Next Screen



Mapping the Fields (cont.)

- Not using the field? - Use “Make Field Smaller” until the yellow is gone.

Dr. Download - Map Fields - Play School High School

Dr. Download Map Fields Wizard

This screen lets you choose or correct where the fields are in your student data.
Use the buttons to select fields to map, move them or change their size so they match your data.

Student Data Fields

Special: Last Name, First Name

File Data Display

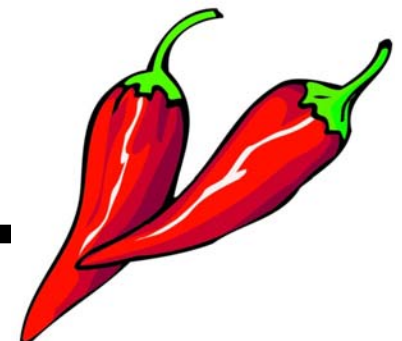
7103229	Brianna	Abelsen	133 Ave Barc	<input type="button" value="▲"/>
7350779	Tavaurus	Abram	350 B Fegan	
7120766	Rabee	Abujudeh	26991 Calle	
7121877	Christine	Ace	430 Plaza Es	
7108297	Elora	Ackerman	28112 Maripo	
7118742	Amy	Adams	2039 Via Vin	
7131925	Aunjel	Adams	24731 Camari	<input type="button" value="▼"/>

Field position = 1 size = 0

Finish Cash Transfer



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Check Your Data

- Make sure all fields are correct before proceeding.
- Check a few students using “Previous” and “Forward” buttons.
- If data is not correct, use the “Back” button to map the fields again.

Dr. Download Wizard - Play School High School

Check Your Data! This is a sample of how Dr. Download translated your student data. Please check the information here to see if it is correct and complete. Click on "Forward" to see the next Student record, or click on "Previous" to see the previous one. If the information for the students is perfect, then click on "Next". If the information is not perfect, click on "Back" to correct the field mapping.

Student Information

Primary ID	7103229	Other ID		Status	Active
Last Name	Abelsen	Birthday	12/01/92		
First Name	Brianna	M.I.	T	Class	12
Address	133 Ave Barcelona			Gender	F
City	San Diego	State	CA	Ethnicity	W
Zip	92128	Home Phone	(949) 492-8464		
GPA	4.0	Email	babelson@cox.net		
Demerits	0	Driver Lic.			
Emerg Phone	858-486-1100	SSN	123-45-6789		
Emerg Contact					

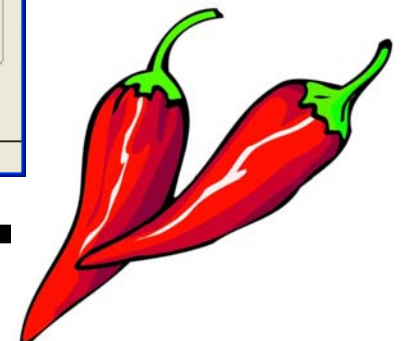
Parents Information

<< Previous Forward >> Back Next Cancel ?

Next Screen



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Save, Keep or Purge—Customers

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

Some Questions About Your Data

Customer History for Students

***Note: Student ID's must remain the same from year to year to save history.**

What would you like to do:

Save history only for Customers those that owe you money

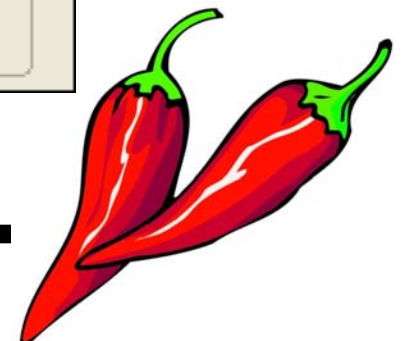
Purge ALL Customer history

You can also elect to save all the transactions since a certain date. If you have already been selling to students for the upcoming year and want to keep those transactions, then enter the earliest date you started selling to them. If you leave this date alone, then customer history will simply be purged or saved as selected above.

Save all transactions entered after this date



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Save, Keep or Purge—Items

- Item Information – You should “Save” your inventory information unless you don’t want to keep your quantity-on-hand totals or you want to change all your item numbers for the new year.

Item Information

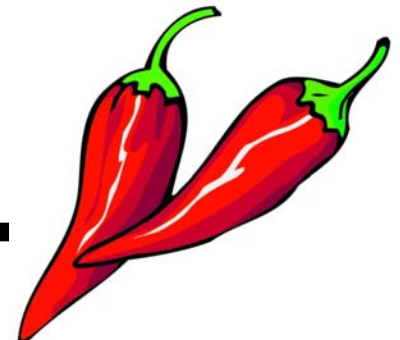
***Note: Items with 'Save History' turned on in Item Maintenance will be saved no matter what you select here !**

What would you like to do:

- Keep ALL item information, including quantities on hand
- Save just the Item No. and descriptions but clear quantities
- Purge ALL Item information



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Save, Keep or Purge–Clubs

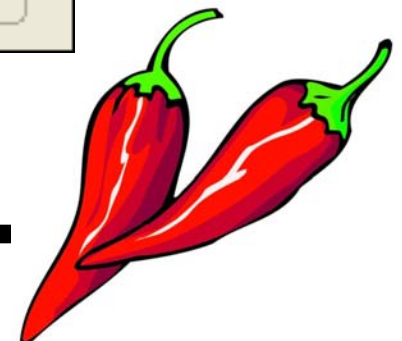
- Club Information – You will want to “Save” your club information. Clubs tend to have a lot of history which can be viewed in the Prior Year school.

More Questions About Your Data

Club Information

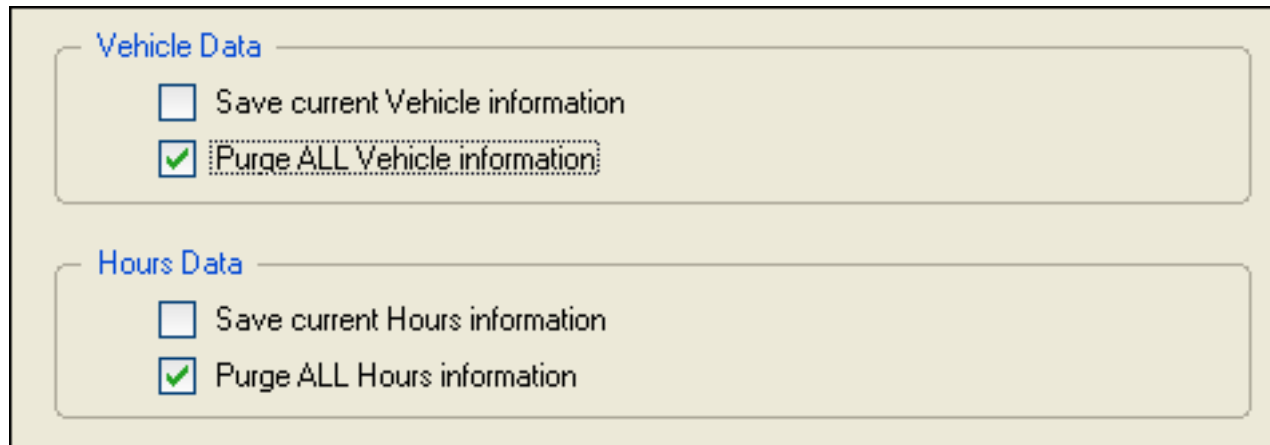
Clubs are Customers whose type is "Club". Dr. Download also considers Faculty and Customers with a Customer No of "ZZ" to be Clubs. What do you want to do?:

- Save the Club No. and name only
- Keep ALL Club history
- Purge ALL names and history



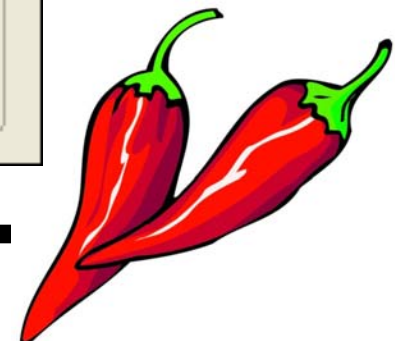
Vehicle and Hours Data

- 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.
- Hours Data – You will want to purge this to start a fresh count in the new year.



The screenshot shows a web form with two sections: "Vehicle Data" and "Hours Data". Each section contains two checkboxes. In the "Vehicle Data" section, the checkbox for "Save current Vehicle information" is unchecked, and the checkbox for "Purge ALL Vehicle information" is checked. In the "Hours Data" section, the checkbox for "Save current Hours information" is unchecked, and the checkbox for "Purge ALL Hours information" is checked.

Section	Option	Selected
Vehicle Data	Save current Vehicle information	<input type="checkbox"/>
	Purge ALL Vehicle information	<input checked="" type="checkbox"/>
Hours Data	Save current Hours information	<input type="checkbox"/>
	Purge ALL Hours information	<input checked="" type="checkbox"/>



Verify Your Choices

- Double check your choices and print them. Save these with your other year end reports.

Dr. Download Wizard - Play School High School

Dr. Download Is Getting Ready To Go !

Please review the following information to check that your selections are correct, because Dr. Download is getting ready to go to work !

Dr. Download Preferences

These are the choices that you made. Press "Back" if they are they are NOT correct !

Customer History	Save history for students who owe money
Keep History From	07/01/07
Item Information	Save Item Names but clear quantities on hand
Club Information	Save just Club IDs and names
Vehicle Data	Purge all vehicle info
Hours Data	Purge all hours information

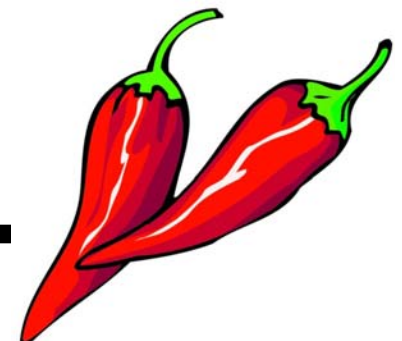
Press "Back" to go back and revise your selections.

Back Next Cancel Print Help

Next Screen



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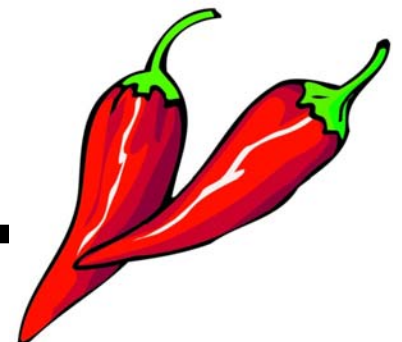


The Student Update Utility

- Updates Customer demographic data. Only adds and updates Customers; never deletes!
- Go to Modules\Student Update Utility.
- Create a new student data file 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.
- You will be able to map fields if the file changes – just like Dr. Download!

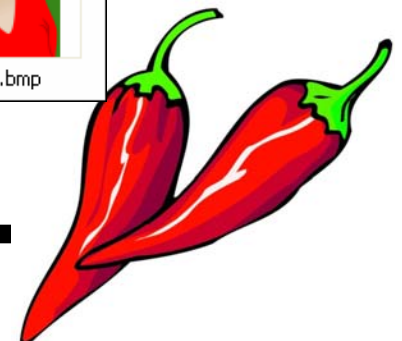
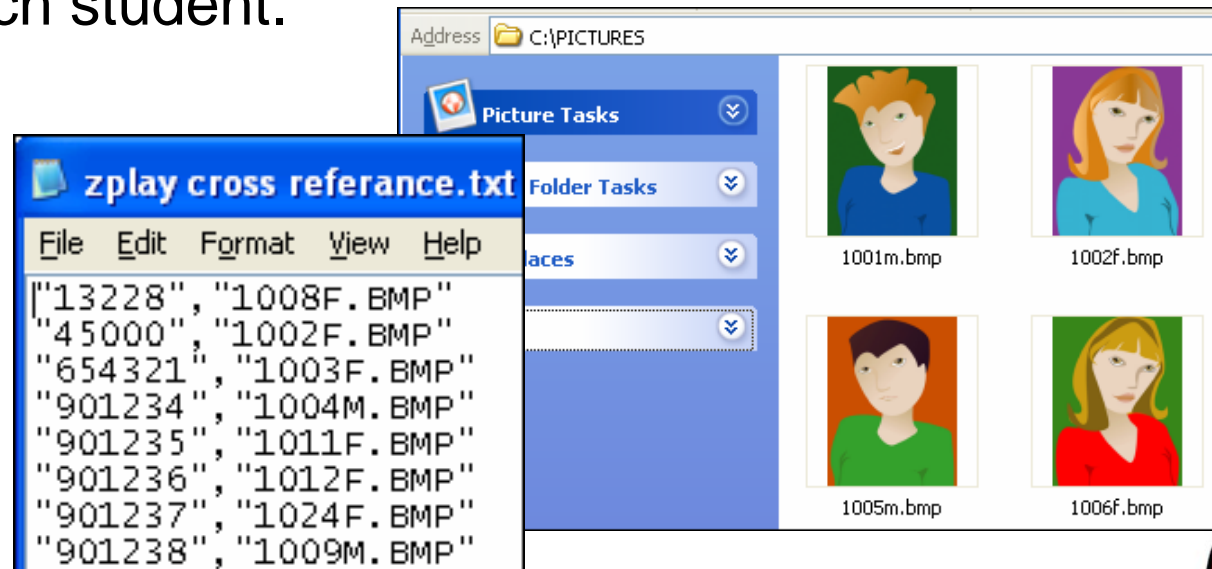


CONNECTIONS 2007



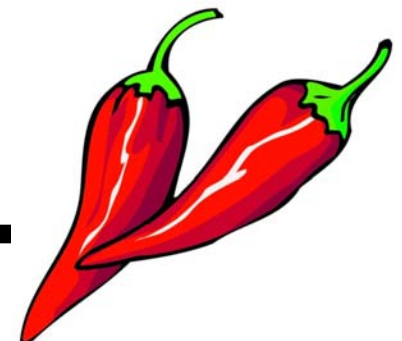
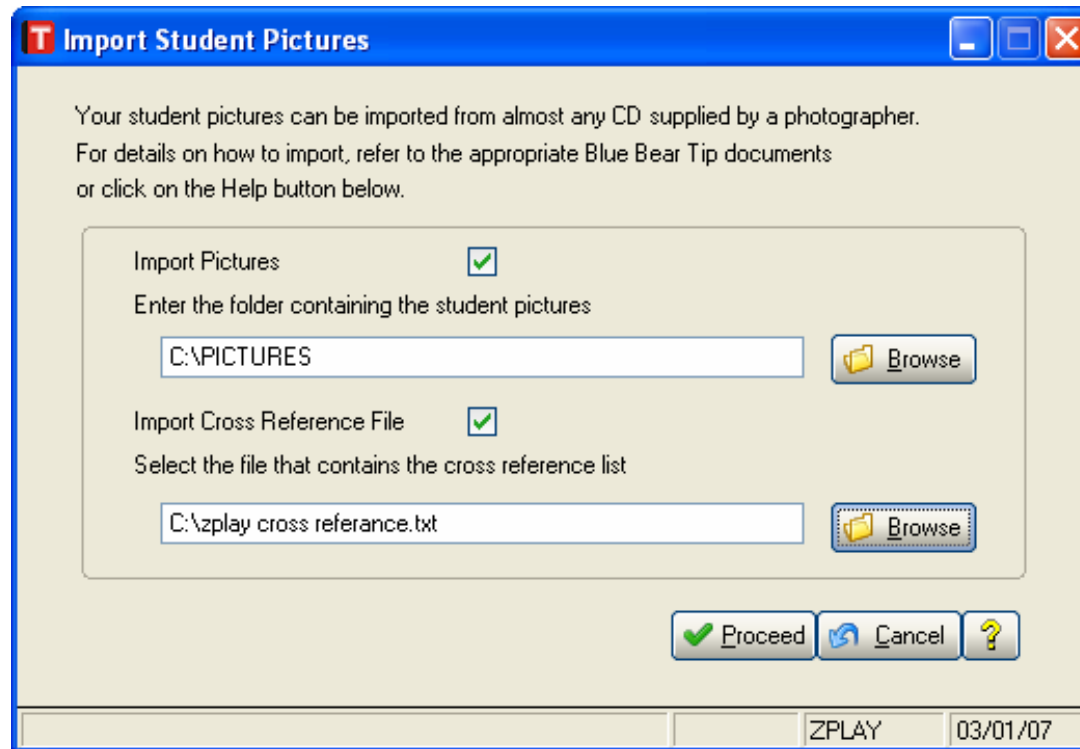
Importing Student Pictures

- Management\Special Functions\Import Student Pictures.
- Must have two separate folders/files:
 - Student picture folder.
 - Cross reference file (generally a text file with extension “.txt”) that tells which picture belongs to which student.



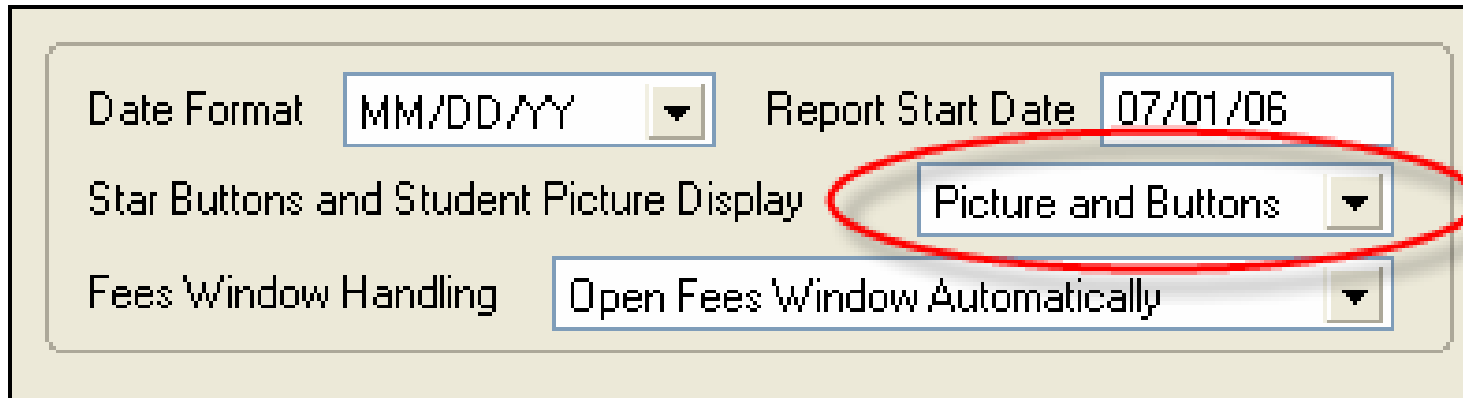
Importing Student Pictures

- You will browse out wherever the Picture folder and your cross reference file are located.



Setup Tracks to Show Pictures

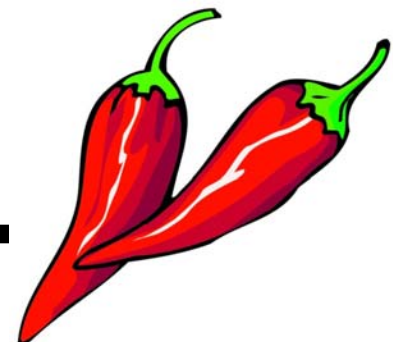
- Setup Tracks to display the Photos on the work screen. (Management/Customize/School Settings/Work Screen Tab)



Date Format Report Start Date

Star Buttons and Student Picture Display

Fees Window Handling



Let's Walk Through It! Or Questions & Answers



CONNECTIONS 2007

