

AIM User Guide:
*Preparing and Verifying
Data for MT E-Transcript
and TEAMS*

THIS USER GUIDE PROVIDES DETAILED INFORMATION ON HOW TO PREPARE AND VERIFY DATA AND COURSE SCED VALUES FOR MT E-TRANSCRIPT AND TEAMS. TOPICS INCLUDED IN THIS GUIDE:

- PREPARING DATA IN INFINITE CAMPUS FOR MT E-TRANSCRIPT
- VERIFYING SECTION VALUES
- VERIFYING SCED VALUES
- COURSE SET-UP AND ROLLING COURSES FORWARD
- IDENTIFYING STATE COURSE CODES FROM NCES DATA

Preparing/Verifying Data & Course Setup and Verifying Course SCED Values for MT E-Transcript and TEAMS

AIM User Guide

This guide explains what preparation work is necessary to have a successful 'Course Extract' from Infinite Campus. It will also detail the Course Set-Up for Montana E-Transcript, as well as how to verify Course Sections and Course SCED Values.

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A.) Preparing Infinite Campus data for Use in the MT E-Transcript

Consider the Following for What is Needed:

1) **Review of the Flow of Course Section Data through Infinite Campus:**

When a course and course section is initially setup in Infinite Campus, the data from those course and course section records is copied/carried in sequence into:

- a) The student's class schedule
- b) The students' report card record for that course
- c) The transcript record, when the students mark is posted from the report card to the transcript record in Infinite Campus.

2) **Important Data Needed for the MT E-Transcript When Setting up a Course:**

- a) The pieces of information in the **COURSE** record that are important to the MT E-Transcript are:
State NCES Course Code information, which consists of the 'SCED Subject' and 'SCED Course ID'
- b) The 'High School Credit' Check box needs to be checked.
- c) The 'Transcript' Check box needs to be checked.

3) **Important Data Needed for The MT E-Transcript When Setting up a 'Course Section':**

The pieces of information in the **course SECTION** record that are important to the MT E-Transcript are:

- a) Session Type
- b) Session Number

4) **Important Data Needed for MT E-Transcript When Hand Entering Students' Transcript Records:**

When a student's transcript record is hand entered into Infinite Campus, these items need to be completed for the course extract to be successful:

- a) SCED Subject and SCED Course ID to make up the State NCES Course.
- b) High School Credit Check Box needs to be checked.
- c) Session Type
- d) Session Number

5) **Notes on 'In Progress' Courses and Missing Course Information:**

- a) The course extract process includes those courses that students are currently in the process of taking and have not yet earned a grade. It generates a derived transcript record by getting the State NCES course code information from the course setup area and creates an 'in progress' transcript record.
- b) If the state NCES course code is blank on an existing transcript record that has been posted by the transcript post tool within Infinite Campus, the course extract process gets the State NCES course code information from the course setup area.

6) **Important Note When Preparing for Upcoming School Year:**

When the district is preparing for the upcoming school year, before running the process to 'Calendar Roll Forward', they need to check to make sure these 'Session Type' and 'Session Number' values that has been set on the current years' course sections. Please run the state published ad hoc report to find missing values. It's also important to check System Administrator settings to make sure these completed values will be copied to the New Year's course sections. Parts B and C below will detail how to do these processes.

B.) Verifying Section Values for TEAMS and MT Transcript Extracts

The 'Session Number' and 'Session Type' values, which are located inside the course section area, are needed for the OPI MT TEAMS extract and MT Transcript extract.

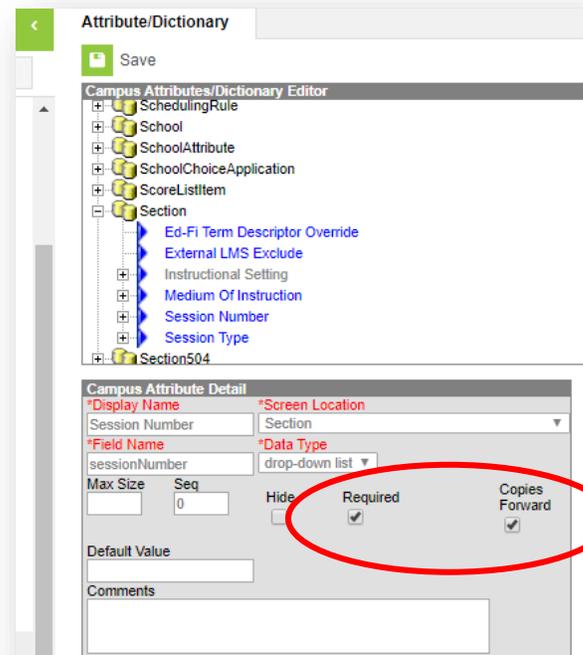
- **To check the completeness of this 'Session Number' and 'Session Type' data**, there is a 'State Published Ad Hoc' report called '**Curriculum MT Missing Course Section Session Info.**' If you find there are course sections listed in the results of this ad hoc report that are missing this 'Session Number' and 'Session Type' information, please modify the course section to include values in these 'Session Number' and 'Session Type' fields.
- **BEFORE conducting the end of year 'Calendar Roll Forward'** process inside Infinite Campus, make sure that the 'Session Number' and 'Session Type' fields on each course section are set to get copied into the next/upcoming years course sections, by checking the attribute dictionary settings and following the steps below.

NOTE: If these values in the attribute dictionary are either:

Not marked to copy forward to the new course sections **BEFORE** the end of year 'Calendar Roll Forward' process is done, OR: Marked to be copied forward but the 'Session Number' and 'Session Type' are not complete in the current year course section. Then each course section that has been already copied to the new school year will need to have these 'Session Number' and 'Session Type' values set individually.

To check if the Attribute Dictionary has the 'Session Number' and 'Session Type' values set to be copied forward into the next school year:

1. Go to the **Index** tab.
2. Select **System Administration**.
3. Select **Custom**.
4. Select **Attribute Dictionary**.
5. To the right, under *Campus Attributes/Dictionary Editor*, click the '+' sign next to **Section**.
6. It will expand. Click the blue word **Session Number**.
7. Make sure that both the **Required** and the **Copies Forward** fields are checked.
8. Click **Save** at the top.
9. Click the blue word **Session Type**.
10. Make sure that both the **Required** and the **Copies Forward** fields are checked.
11. Click **Save** at the top.



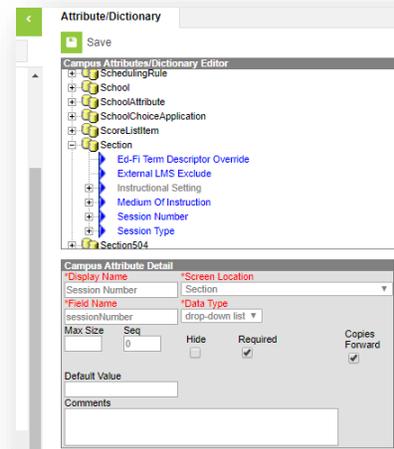
C.) Verifying Course SCED Values for TEAMS and MT Transcript Extracts

The course 'SCED' information such as Subject area, Course Identifier, low grade, high grade, course level, sequence number or state code values are located inside the course area and are needed for the OPI MT TEAMS extract and MT Transcript extract.

To check the completeness of the course 'SCED' data:

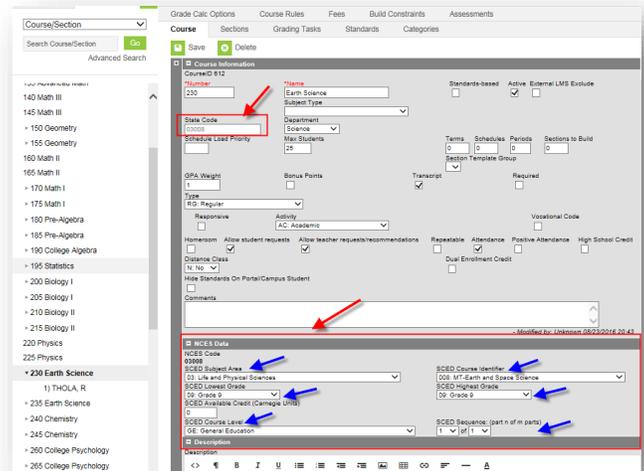
There is a 'State Published Ad Hoc' report called 'Curriculum MT Course Missing SCED Information.' If you find there are courses listed in the results of this ad hoc report that are missing the 'SCED' information, please modify the course to include values in these fields.

- 1) Go to the **Index** tab.
- 2) Select **Ad hoc Reporting**.
- 3) Select **Filter Designer**.
- 4) Select the + sign by **State Published** from the list of *Saved Filters*.
- 5) Scroll down to find the **Curriculum MT Course Missing SCED Information** ad hoc and click on it.
- 6) Select the school(s) to include in the ad hoc.
- 7) Click **Search** and it will automatically produce a list of courses/sections missing SCED information which you can click on to view the course information. Or click **Test** and it will produce a report with a list of courses missing SCED info.



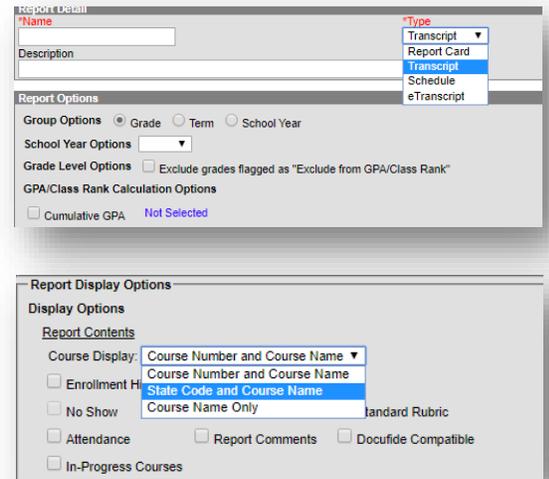
To change the SCED fields inside the course information:

- 1) Run the Ad Hoc above. Click **Search** and it will automatically produce a list of courses/sections under the **Search** tab.
- 2) Click on one of the courses to view the **Course** details tab. (pictured right)
- 3) The **State Code** field should be set to the same value as the **NCES Code** (located in the bottom NCES portion of the screen in the upper left corner.) *The NCES Code is made up concatenating the two digits of the SCED Subject area and the three digits of the SCED Course Identifier.* For example, SCED Subject Area (e.g. value = 19) + SCED Course Identifier (e.g. value = 203) = State Code (value = 19203). This combination of the SCED Subject Area and the SCED Course Identifier is also referred to as the 'NCES code.'
- 4) Click **Save** at the top after the **State Code** has been entered.



To make the State Code value visible on the districts transcript within Infinite Campus:

- 1) Go to the **Index** tab.
- 2) Select **System Administration**.
- 3) Select **Preferences**.
- 4) Select **Reports**.
- 5) Click **New** at the top.
- 6) Name the report.
- 7) Select **Transcript** from the box labeled **Type** in red.
- 8) Scroll down to Report Display Options.
- 9) Select **State Code and Course Name** from the *Course Display* drop down box.
- 10) Click **Save** at the top.



NOTE: When preparing for a new school year, to ensure courses are copied to the New Year correctly, the 'Copies Forward' check box has been locked. Refer to [Part B](#) of this guide for that process.

D.) Course Set-Up for MT E-Transcript and Rolling Courses Forward

The statewide rollout of the Montana Electronic Transcript Initiative occurred in Fall of 2015. Through this project, students can send free certified transcripts to any institution in the country or other locations that require transcripts. Infinite Campus *District Edition* schools have a transcript extract utility which allows them to submit the student data required to produce a Montana standard transcript. **Infinite Campus District Edition** schools must mark the high school courses in their system that students take for high school credit.

NOTE: District courses must be flagged as “**High School Credit**” prior to posting to a student transcript for the course to transfer to the Montana Electronic Transcript system.

To designate a course as High School Credit:

- 1) Select the **current year** and a **high school calendar**.
- 2) Select the **Search** tab.
- 3) Select **Course/Section** from the **search criteria box**.
- 4) Leave the search box blank, click **Go**.
- 5) Select a course to designate as receiving **high school credit**.
- 6) On the **Course** tab, select the **High School Credit** box so it is checked.
- 7) Click **Save**. (This designation will now carry forward to subsequent years.)

The screenshot displays the '1006A STUDENT AIDE' course setup page. The 'Course Information' section includes fields for CourseID (10450), Number (1006A), Name (STUDENT AIDE), State Code (22995), and Department (Other). The 'High School Credit' checkbox is checked and highlighted with a red box. Other options include 'Standards-based', 'Active', 'External LMS Exclude', 'Course-Only Curriculum', 'Advisory', 'Transcript', 'Required', 'Vocational Code', 'Repeatable', 'Attendance', 'Positive Attendance', and 'Dual Enrollment Credit'. The 'NCES Data' section at the bottom shows 'NCES Code' (22995), 'SCED Subject Area' (22: Miscellaneous), and 'SCED Course Identifier' (995: Miscellaneous - Aide).

NOTE: There are two State Published Ad Hoc Reports designed to help Infinite Campus District Edition schools in this effort:

- a) Curriculum MTTranscript Course HS Credit Check Marked
- b) Curriculum MTTranscript Course HS Credit NOT Checked

To Roll Courses Forward:

For districts who have not yet rolled calendars forward, the *High School Credit* designation will automatically roll forward from the previous year, **but only if the proper calendar roll forward options are selected.**

NOTE: Districts who have already rolled their high school calendars forward will have to mark *High School Credit* on the course tab in both the previous and current school years. Run this wizard off-peak hours.

1. Go to **Index**.
2. Select **System Administration**.
3. Select **Calendar**.
4. Select **Calendar Wizard**.
5. Select **Create New Calendars by rolling forward selected data (last years data will be added to a newly created calendar)**. Click **Next**.
6. Select the **Year**.
7. Enter a **Start and End Date**. Fields in red are required.
8. Select the *Calendars* you wish to roll forward, click **Next**.
9. Select the **Courses** value so that the box is checked. Only the **Courses** value must be selected for *High School Credit* to roll forward. The district does not have to select all options under **Courses**.
10. Click **Run Wizard**.
11. A progress report will appear and will indicate when the process is complete.

Calendar Wizard
Copy, Rollforward, or Create new Calendar-linked Data
This wizard will walk you through the creation of new school calendars by rolling data forward, or copying an existing calendar.
Note: Creating calendars is a database intensive procedure. It can take a long time to complete, and may slow down the system.

Select Wizard Mode

Create new blank Calendars
 Create new Calendars by rolling forward selected data (last-years data will be added to a newly created calendar).
 Copy data into Existing Calendars

< Back Next >

Calendar Wizard
Copy, Rollforward, or Create new Calendar-linked Data
This wizard will walk you through the creation of new school calendars by rolling data forward, or copying an existing calendar.
Note: Creating calendars is a database intensive procedure. It can take a long time to complete, and may slow down the system.

Edit Calendar Attributes for new Calendars

Year: 19-20
Name Template: [year][schoolname]
Number: []
*Start Date: 04/01/2020
*End Date: 03/04/2021

Select Calendars to Roll

- 18-19 Community Ed
- 18-19 Highland Park School
- 18-19 Lincoln-McKinley School
- HHS 2019-20
- HMS 19-20 Non-Public
- HMS 2019-20
- HP 19-20 Non-Public
- HP 2019-20
- LM 19-20 Non-Public
- LM 2019-20
- SS 19-20 Non-Public
- SS 2019-20
- 17-18 Community Ed
- 17-18 Highland Park School
- 17-18 Lincoln-McKinley School
- HHS 2018-19

CTRL-click and SHIFT-click for multiple

< Back Next >

Pick the Data to Copy

Calendar Attributes
 Schedule Structures
 Term Schedules (NOTE: Term dates will not roll if they fall outside of the calendar start and end dates.)
 Period Schedules
 Days
 Day Events
 Section Templates
 Grade Levels
 Courses
 Sections w/ Schedule Placement
 Teacher Assignments
 Section Staff Assignments
 Room Assignments
 Grading Tasks, Credits, Standards
 Categories
 Grade Calc Options
 Course Rules
 Schedule Building Constraints
 Course Fees
 Assessments
 Attendance Excuse Codes
 Scheduling Teams
 Section Team Assignments
 Calendar Overrides
 GPA Calculations

Run Wizard

E.) Other Notes for Infinite Campus 'Built In' Data Validations:

1. The '**State Code**' is 'read-only' in the following locations:
 - a) Search> Course/Section > Select Course> View the State Code value.
 - b) Index> System Administrator > Grading & Standards> Course Master(if any)> State Code.
 - c) Index> Student Information > General > Search Student> Select Student> Select Transcript > View the State Code.
 - d) Index> System Administration> Data Utilities> Student Records Transfer > Transcript Import Wizard > State Code.
 - e) Index> Grading & Standards > Course Catalogs (if any) > View the State Codes.
2. The '**SCED Course Identifier**' dropdown is sorted based on the values that start with 'MT' to be at the top of the list in the following locations:
 - a) Course.
 - b) Course Master (if any).
 - c) Index> Student Information > General > Transcript.
 - d) Index> Student Records Transfer > Transcript Import Wizard.
3. The '**SCED Subject Area**' and '**SCED Course Identifier**' fields are **now required** in these areas:
 - a) Index> Student Information > General > Transcript.
 - b) Index> Student Records Transfer > Transcript Import Wizard.
4. Updates were made to ensure the '**State Code**' is pushed from **Course** to **Course Master** when the '**NCES Data**' field is checked on a **Course Catalog**.
5. Updates were made to ensure '**SCED Subject Area**' and '**SCED Course Identifier**' validations are working correctly in the following areas:
 - a) Course.
 - b) Course Master.
 - c) Index> Student Information > General > Transcript.
 - d) Index> Student Records Transfer > Transcript Import Wizard.

For more information, contact the AIM Help Desk at 1- 877-464-6681 or

[Submit an AIM Help Desk Ticket](#)