



# Good Morning, Aeries!

## Creating Pre-Enrolled Students



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**March 13, 2024**





# Good Morning, Aeries!

- Session will last 30 – 45 minutes
- Show and Tell
- Casual
- Time for Q & A
- PPT & Recording Posted



# NEED TO KNOW

- ALWAYS create a back up of your database before mass create or import (SQL or ticket to Aeries)
- ALWAYS create a back up of your database before mass create or import
- The low/high grade in School Options will allow students to pre-enroll outside of grade range
- If students are coming from a feeder school; has an information file been requested, so that the data can copied into the Import Template you've chosen?



NICE  
TO  
KNOW

## 4 Ways to Pre-enroll student records:

1. Pre-Enroll individual students
2. Create pre-enrolled students from feeder school(s) in the same district database
3. Copy students from a feeder school that uses Aeries
4. Import students from a feeder school that does or does not use Aeries



# 1. Pre-enrolling a single Student

On Student Data, click the 'Add' button and use the 'Search Criteria' page to determine if student has ever been enrolled in District.

Either add 'Inactive Found' record or click 'Student Not Found' button

Next choose 'Yes' to Search Sibling? option. Select either 'Use Sibling' or 'Sibling Not Found' option

Search Criteria

Last Name

First Name

Birth Date

Student ID

smith

Search

Schl	StuNum	Stu ID	Last Name	First Name	Middle	Grd	Gender	Birthdate	Status	Enter Date	Leave Date	Parent/Gu
992	631	99200631	Smith	Adam		1	M	11/30/2016	*	9/28/2018		M/M S Sn
994	2401	99402401	Smith	Adam	D	11	M	5/18/2006		9/8/2017		M/M S Sn
991	807	99100807	Smith	Alexis	Nicole	1	F	2/7/2015		3/15/2017		M/M S Sn
894	2786	3	Smith	Bob		9	M	9/9/2006		7/13/2022		
994	2402	99402402	Smith	Brandon		10	M	8/5/2007		1/4/2019		M/M S Sn
994	2403	99402403	Smith	Breanna	Don	8	F	4/17/2010	*	8/3/2023		M/M S Sn
993	565	99300565	Smith	Christine	C	8	F	6/15/2009		9/5/2016		M/M C Sr
994	2404	99402404	Smith	Christine	C	8	F	6/16/2009	*	8/3/2023		M/M C Sr
994	2405	99402405	Smith	Christopher	Goron	8	M	7/15/2010	*	8/3/2023		M/M S Sn
991	808	99100808	Smith	Cody	De Jesus	5	M	7/13/2012		10/18/2016		M/M S Sn
994	2406	99402406	Smith	Daniel	T	12	M	3/17/2004		9/1/2016		M/M S Sn
994	2407	99402407	Smith	Desiree	Margie	9	F	9/28/2007		8/15/2019		M/M S Sn

Student Not Found

Cancel Lookup

Transfer Student

Search Prior Year

Sibling Search Criteria

Student Last Name

Student First Name

Birth Date

Student ID

Phone Number

smith

Search

Parent Last Name

Parent First Name

Address

Email Address

Last	Schl	Name	First Name	Middle	Grd	Gender	Birthdate	Parent	Address	Primary Phone	Status	Enter
994	Kendall-Smith	Zandria	Lee		10	F	4/23/2007	M/M K Kendall-Smith	449 N Orange Grove	(777) 555-5983		5/18/
992	Smith	Adam			1	M	11/30/2016	M/M S Smith	112 KEVIN STREET	(777) 555-1305	*	9/28/
994	Smith	Adam	D		11	M	5/18/2006	M/M S Smith	5531 Aspan	(777) 555-5352		9/8/
991	Smith	Alexis	Nicole		1	F	2/7/2015	M/M S Smith	33508 Rodeo St	(777) 555-1637		3/15/
894	Smith	Bob			9	M	9/9/2006					7/13/
994	Smith	Brandon			10	M	8/5/2007	M/M S Smith	1121 Glendon	(777) 555-5383		1/4/
994	Smith	Breanna	Don		8	F	4/17/2010	M/M S Smith	995 N Dodsworth Ave	(777) 555-5905	*	8/3/
993	Smith	Christine	C		8	F	6/15/2009	M/M C Smith	17341 Amaganset Way	(999) 544-8876		9/5/
994	Smith	Christine	C		8	F	6/16/2009	M/M C Smith	17341 Amaganset Way	(999) 544-8876	*	8/3/
994	Smith	Christopher	Goron		8	M	7/15/2010	M/M S Smith	66 Rising Hill Rd	(777) 555-5587	*	8/3/
991	Smith	Cody	De Jesus		5	M	7/13/2012	M/M S Smith	5519 Katrina Pl	(777) 555-7070		10/18/

Sibling Not Found

Cancel Student Add Process

Use Sibling

## Click 'Save' button

Schl Enter Dt	Schl Leave Dt	9th Grade Entry Year	Cohort
8/31/2012		2021-2022	2024-2025

# Pre-Rollover Audit

❑ Use the audit to identify inaccurate data fields required for the mass pre-enrolled processes

❑ Saved queries can also be used to identify inaccuracies

### Print Pre-Rollover Audit Listing Report Options

Report Format: PDF  
Report Delivery: None

General Report Options	*Next* Field Comparison Options
Include Inactive Students <input type="checkbox"/>	Next Grade is not equal to Grade + 1 <input checked="" type="checkbox"/>
Include Pre-Enrolled Students <input checked="" type="checkbox"/>	Include Retained (Next Grade = Grade) <input type="checkbox"/>
Include Summer/Interession Schools <input type="checkbox"/>	Next Teacher is not equal to Teacher <input type="checkbox"/>
Include Inactive Schools <input type="checkbox"/>	Next Program is not equal to Program <input type="checkbox"/>
Include Invalid Next Teacher errors <input type="checkbox"/>	Next Res Schl is not equal to Res Schl <input type="checkbox"/>
Include Students with Student ID = 0 <input type="checkbox"/>	Next Grid Code is not equal to Grid Code <input type="checkbox"/>
Include Students with Next School = 0 <input checked="" type="checkbox"/>	Next IntDstTrans is not equal to IntDstTrans <input type="checkbox"/>
Include Students Concurrently Enrolled <input type="checkbox"/>	Next Track is not equal to Track <input type="checkbox"/>
Include Students Not Pre-Enrolled in Next School <input type="checkbox"/>	
High Grade: 8	

WARNING: This report may take up to 15 minutes to complete.

Run Report

Query that lists highest grade level students with current grade, next grade and next school:

```
LIST STU ID NM GR NG NS IF GR = 8
```

- Always Back Up your database before running any mass change process!



# Create Pre-Enrolled Students

## □ Notes

- Usually, the **Create Pre-Enrolled Students** process is run once per school year in the second semester. If necessary, the process can safely be run multiple times without creating duplicate student records.
- The **Create Pre-Enrolled Students** process will not create a NEW copy of a student if they already exist in the next school.
- If a Student has a Pre-enrolled copy in the next school already - no change - logged as "Already pre-enrolled",
- If a Student has an Active copy in the next school - no change - logged as "Already active",
- If Student has an Inactive copy in the next school - the status of that record will be changed to "\*", logged as "Existing Inactive to Pre-Enrolled", update Grade and Next Grade





## 2. Create Pre-Enrolled Students - Schools

**Aeries**  
Student Information System

Search students...

Pages Reports Favorites

Filter Pages...

Street Address Management

Portal Management

Configurations

**Functions**

- Administrative Functions
- Backup Gradebooks
- Calculate College Entrance Reqs
- Combine Student Records
- Copy Many Student Records
- Create Multi Track Calendar
- Create Pre-Enrolled Students**
- Language Assessment Management
- Mass Add Student Related Data
- Mass Add Pictures
- Mass Assign Family Keys
- Mass Change Area Codes
- Mass Copy Gradebooks
- Mass Create Gradebooks
- Mass Set Grade Fields

### Create Pre-Enrolled Students

#### Schools

**Schools to Copy From:**

- ☐ 900 X Eagle District School
- ☐ 901 X NPS School
- ☐ 902 X Private School
- ☐ 990 Golden Eagle Elementary School
- ☐ 991 Tawny Eagle YR Elementary School
- ☐ 992 Hawk Elementary - Elem Scheduling
- ☒ 993 Bald Eagle Intermediate School
- ☐ 994 Screaming Eagle High School
- ☐ 995 Aeries Continuation School
- ☐ 996 Eagle Flight School

Select Grade Levels to Limit Schools TK - 12

**Schools to Copy To:**

- ☐ 884 Mountain Eagle High School SEC STF
- ☒ 894 Flex Soaring Eagle High School
- ☐ 900 X Eagle District School
- ☐ 901 X NPS School
- ☐ 902 X Private School
- ☐ 990 Golden Eagle Elementary School
- ☐ 991 Tawny Eagle YR Elementary School
- ☐ 992 Hawk Elementary - Elem Scheduling
- ☐ 993 Bald Eagle Intermediate School

Select Grade Levels to Limit Schools TK - 12

**Tables**

**Analysis**

**Results**

☒ Change New Students Enter Date 3/1/2023

Analyze Update

**✳ The option to "Add Students where they already exist" is no longer necessary.**

- If an active copy of a student exists, it is recommended to use that student in pre-scheduling.
- If an inactive copy of a student exists, that record will be used as the new pre-enrolled record.

Will enter date be the 1<sup>st</sup> day of school?  
Or will enter date indicate when records were pre-enrolled?

# Create Pre-Enrolled Students - Analysis

Tables – only the non ID-based tables will need to be selected, if your school wants that information included on the pre-enrolled record

Analysis – understand the options and it determines which student records will be copied into the new school

Schools

Tables

Analysis

Next Grade/Next School Analysis:

☐ Process All Active Students

☒ Process High Grade Only

☒ Bypass Students with NS = SC

☐ Bypass Students with NS = 0

☒ Bypass Students with NG = GR

☒ Limit SC by "FROM" Selection


☒ Limit NS by "TO" Selection


Calculate Totals

SC	School Name	GR	NG	NS	Count
<div>After using the Calculate Totals button; this area will list the schools that had data copied over, along with a row for each grade, next grade, the next school code and the total records for each grade level.</div>					

# Create Pre-Enrolled Students - Update

Aeries Create Pre-Enrolled Students Results

 DoNotReply@aeries.com

 processlog\_20200213093821270.csv  
9 KB

**Create Pre-Enrolled Students Summary - Eagle Unified School District**

The Create Pre-Enrolled Students Process completed at 2/13/2020 9:38:21 AM

Total Pre-Enrolled Student Records Created: **232 records**

**Options**

Schools Copied From: 990,991,992,993,994,995,996,997

Schools Copied To: 994

Related Tables Copied: SUP,SSD,ATN

Enter Date: 8/10/2020

You may review the attached file detailing the process.

Click 'Update' to run the process. You can leave this page and you will be notified by email when it is completed. A csv file is created for your review.

If the Create Pre-Enrolled process has been run before, there will be a message alerting you of the date/time it was last run.



Create Pre-Enrolled Students - Last run - 12/01/2017 10:16:06 AM

### 3. Copy Many Student Records

- Can be used to copy one or more incoming students from schools in a **separate Aeries** database.
- For example, a high school district that has obtained a copy of the Aeries database from a feeder district can copy current 8th grade students from the feeder database as incoming 9th graders.
- ***DO NOT USE*** this process if students are in the same Aeries database/district.

*Technical Note: If the source database is on a different SQL Server than the current database, then a Linked Server must be created in the current SQL Server instance if it is not already. The Linked Server name must match the server name specified in the AeriesNetConnections config file for the source database. Configuring Linked Servers is outside the scope of Aeries support. [Click here](#) for Microsoft documentation on Linked Servers. This content is not under the control of Aeries Software.*



# Copy Many Student Records (continued)

Search students...

Pages Reports Favorites

Filter Pages...

Portal Management

Configurations

Functions

Administrative Functions

Backup Gradebooks

Calculate College Entrance Reqs

Combine Student Records

Copy Many Student Records

Create Multi Track Calendar

Create Pre-Enrolled Students

Language Assessment Management

Mass Add Student Related Data

Copy Many Student Records

Copy Many Student Records - Last run - 07/05/2020 10:19:38 PM

Please use the Create Pre-Enrolled Students page for copying students within your own database

Info

This page is used to copy student records into the current school from a different Aeries database. For example, students in a feeder district can be copied into your school. Follow the steps below to start the process.

1. Select the Database Group, Year and School(s) that you want to copy students FROM under the Schools section. Note that the source database must already be configured in your Aeries Connections file.
2. Select which tables you would like copied under the Tables section. Note that the tables selected by default are ones that have data in your current database.
3. Select Student Update Options and Student Selection Options under the Options section.
4. Click Copy Students.

Schools

Tables

Options

Options

Student Update Options

☒ Add 1 to student's grade level

☒ Assign new Student IDs to avoid conflicts

☐ Reassign Student IDs starting with:

☒ Tag students \*\*\* (asterisk) for "pre-enrolled for next year"

☒ Set School Enter Date:

3/1/2023

☒ Set District Enter Date:

8/21/2023

Student Selection Options

☐ Only copy students with this school as their next school

☐ Only Copy These Student IDs

Grade Levels to Copy:

All/None

☐ PS ☐ TK ☐ K ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

☐ 6 ☐ 7 ☒ 8 ☐ 9 ☐ 10 ☐ 11 ☐ 12

☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17 ☐ 18

☒ Copy Active Students Only

☐ Copy Active and Pre-Enrolled

☐ Copy All (Include Inactives)

Copy Students

# 4. Import Data to Aeries

## > Import Students Tab

### Import Data to Aeries – Import Students tab

- Can be used to Import Students from a feeder school (Aeries or non-Aeries) that does not belong to your District.
- Must request a file (xls or csv) from feeder school that contains the data that you need for a basic enrollment record. That data will be matched and copied to the Import Students template you have selected.
- You can modify the columns in either template, if you don't need all the fields listed.
- Import Data to Aeries can also be used to import data into Custom Tables or non-student related tables (ex. Staff)
- *Special Note:* The support documentation is not complete for the Import Students tab.





# Import Data to Aeries – Import Students tab

Aeries

Student Information System

Search students...

Pages

Reports

Favorites

Filter Pages...

Ed-Fi System Init and Testing

Ed-Fi Code Mappings

Escape HR Custom Import

Foster Import (BETA)

Golden State Seal Merit Diploma

NSLP Import

Career Pathway Extract Files

Import Data to Aeries

Import Test Results

Import New File

Import Students

Imported File History

Save Mapping

Add Student Options

This is for Importing New Student Records only, to update student fields, use the Import New File Tab. This process will only attempt to create a new STU record, auto assigning SN and ID fields.

Import Templates:

Student Import - Common Fields

Student Import - All Fields

☒ Honor Primary Fields

Any Rows not containing data for primary fields will be skipped.

Next Grade (STU.NG):

☒ By GR + 1

☐ By GR

☐ Map from file row

Determine how the Next Grade (STU.NG) will be set.

☒ Map from file row

Force Status of: Pre-Enrolled ...

Set All Imported Students to a specific status, or manually mapped

Student ID (STU.ID):

☒ Auto Generated

☐ Starting At

#####

ID Must be assigned by the server.

Set Import Options And Continue

## Student Import – Common Fields template

[illegible]



# Import Data to Aeries – Import Students tab (continued)

After importing file data, you can preview and confirm mapping to STU table fields. (click the 'Save Mapping' button at the top of the page, if you plan to use the setup again)

Click the 'Import xx Student Rows' button

When import is complete, the import information is stored in the 'Imported File History' tab

## Import Data to Aeries – Import Students tab

File Preview										<input checked="" type="checkbox"/> First Row contains headers
SC	LN	FN	MN	GN	GR	BD	PG	AD	CY	
902	Lacey	Alayna		F	0	04/18/2017	Karen Lacey	14832 Kitterman Dr	Eagle	
902	Mayer	Bruce		M	10	03/22/2007	John and Linda Mayer	105 Hoover Ave	Eagle	
902	Simons	Lucas		M	7	05/06/2010	Mr and Mrs Arthur Simons	6152 Cielo Vista	Eagle	

### Mapping And Import

STU Table Fields						Student Data
Aeries Field Name	Source Column From File	Is Primary	Description	Data Type	Nullable	Issues
SC	SC	yes	School	smallint (32,767)	no	
SN	Will be Auto Generated	yes	Student#	int (2,147,483,648)	no	
LN	LN	yes	Last Name	nvarchar (100)	no	
FN	FN	yes	First Name	nvarchar (100)	no	
MN	MN	no	Middle Name	nvarchar (100)	no	3 Rows Empty.



# WHERE TO GO

Enrolling New Students for Next Year in the Current Year Database –  
<https://support.aeries.com/support/solutions/articles/14000081559-enrolling-new-students-for-next-year-in-the-current-year-database-pre-enrolled->

Pre-Rollover Audit Listing Report  
<https://support.aeries.com/support/solutions/articles/14000067767-pre-rollover-audit-listing-report>

Create Pre-Enrolled Students process –  
<https://support.aeries.com/support/solutions/articles/14000076586-create-pre-enrolled-students-process>

Copy Many Students process –  
<https://support.aeries.com/support/solutions/articles/14000084488-copy-many-student-records-process>

Import Data to Aeries /Import Students tab–  
<https://support.aeries.com/support/solutions/articles/14000102033-import-data-into-aeries>





# THANK YOU!

If you need full Aeries training, send email to  
[training@aeries.com](mailto:training@aeries.com)





# Feedback:



<https://survey.alchemer.com/s3/7443595/Aeries-Training-Survey>