Aeries Legacy NYR Preparation Check List

Next Grade and Next School fields must be populated for ALL student records

☐ Select the date range where Aeries will be unavailable to staff, including teachers, and students/parents. Communicate with all appropriate Staff to ensure you have a date that will work for everyone

    Rollover Date/Window: _____

    Last Day of Current School Year: _____

    First Day of New School Year: _____

    Date to Open Web Portals: _____

☐ Review New Year Rollover documentation for any new requirements and options.

    New Year Rollover

☐ Run Administrative Functions and Become familiar with Table Record Counts

    New Year Rollover Processing & Reports

☐ Add any new school codes for next year and verify the High (LOC.HI) and Low (LOC.LO) Grade level for all schools and the district. LIST LOC CD NM LO HI

    **STU.NS should be updated accordingly for any students rolling into a new school code

☐ Verify your Inactive School Code, Inactive Status Tag, and Rollover Status Tag Codes. Aeries recommends creating a unique Status Tag code for the rollover so it can easily be queried in next year's database. Many districts use the code 'Z'.

    Inactive School Code: _____

    Inactive Status Tag: _____

    Rollover Status Tag: _____

☐ Verify any Special Session Schools or Schools not rolling forward have been set accordingly on the New Year Rollover School Settings Form; Special

    Session schools: _____

    Schools not Rolling forward: _____

☐ Verify if the following tables will roll into the new school year database and set these fields accordingly on the New Year Rollover School Settings Forms;

    ☐ MST ☐ MED ☐ ATN ☐ TFL ☐ SFL ☐ FEE ☐ FRE

    New Year Rollover Settings

☐ Review any defined School-Based Codes that need to be added or changed?

☐ Review Fields to Sync/Lock on STU, SUP, SSD

    Define Fields to Sync-Lock

☐ Run the Pre-Rollover Audit Listing in Aeries Web Version and correct any errors.

    Pre-Rollover Audit Listing

**You will run this report multiple times before your rollover to clear as many errors as possible

☐ Run any/all other Audit Listing reports in Aeries and fix errors.

☐ Ensure that the school year has been closed out appropriately for CALPADS reporting.

    CALPADS & Closing out the School Year

☐ Verify that all students who will be leaving over summer have been tagged accordingly;

    End of Year Withdrawals and EOY2 CALPADS Withdrawal Chart

    ☐ Complete Grades (GRD) entry and verify the correct Marks are copied accurately to Grade History (GRH) and Transcripts (HIS) for High Schools and Middle Schools.

    ☐ Complete entry of Standards Based Grades (SBG) and verify the roll to Standards Based History (SBH) is completed.

☐ Create Report Card History for GRD and SBG if applicable;
[Report Card History](#)
[SBG Report Card History](#)
☐ Review Graduation Requirements. Will they need to be incremented next year?
☐ Review your Summer School session(s). Is your Summer School in the current year, next year or a separate database just for Summer schools?
[Summer School Process](#)
☐ Review Security for administrative and teacher staff – Check School Access and what users have permissions to for LAST YEAR, and BEFORE LAST YEAR - [Aeries Security Users](#)
☐ Review any 3rd Party Extracts that will need to be adjusted for the new school year.

_____

_____

☐ Using Parent Data Confirmation (Summer Re-registration) (PDC)? ☐NO ☐YES (If YES, see next bullet point)
☐ Review your Parent Data Confirmation window to confirm data for the next school year? If this window is open, what date did you open the window? _____

Entering a date in **Do NOT Close AUT if Status Date is After:** will not close Authorizations that have been updated in the latest Data Confirmation.
This allows schools that have Parents start Data Confirmation prior to the Rollover leave those new Authorizations open and close out the last years' Authorizations.
[Parent Data Confirmation](#)
☐ Using Online Enrollment? (This is not Summer Re-registration) ☐YES ☐NO
    **If you are a Self Hosted Online Enrollment customer, you will need to update your Online Enrollment configuration when your rollover is complete
☐ Using EM2? ☐YES ☐NO
☐ Using Aeries Communications? ☐YES ☐NO

Queries to help verify data:

☐ Verify the Next School (**STU.NS**) field is populated with the school the student will be attending next year, even if the student is returning to the same school.
  - LIST STU SN LN FN ID GR NG SC NS TG BY NS IF TG = " " AND SC # NS AND NG < X (where X is the highest-grade level for that school)

☐ Verify that the Next Grade (**STU.NG**) field is increased by one from the current Grade field to ensure that the student will roll over properly (unless they are retained).
  - LIST STU SN LN FN ID GR NG SC NS TG BY GR IF TG = " " AND NG # ((GR + 1))

☐ Verify students retained or returning seniors. Including non-completers!
  - LIST STU SN LN FN ID GR NG SC NS BY GR IF TG = " " AND GR = NG

☐ Verify ALL schools have setup their pre-enrolled students with the correct next grade and that there is an asterisk (*) in the **STU.TG** field.
  - LIST STU SN LN FN ID GR NG SC NS TG BY GR IF TG = "*"

☐ If the students will be assigned a teacher for the upcoming school year OR a new track, verify the Next Teacher (**STU.NT**) and Next Track (**STU.NTR**) fields.
  - LIST STU SN LN FN ID GR NG SC NS NT CU TR NTR BY NG NT NTR IF TG = " " OR TG = "*"

There are several additional Student "Next" fields to consider; please review if your district/schools use these fields:

Use the following query for all additional Student "Next" fields.

Add the BY….IF….statements below the queries if needed:
  - LIST STU SN LN FN ID GR SP NSP AP1 NP1 AP2 NP2 GC NGC RS NRS IT NIT ITD NTD

☐ Verify Next School of Residence – **BY** SC NM **IF** NRS # RS

☐ Verify Next Inter/Intra District Transfer – **BY** SC NM **IF** NIT # IT, **BY** SC NM **IF** NTD # ITD

☐ Verify Next Programs – **BY** SC NM **IF** NSP # SP, **BY** SC NM **IF** NP1 # P1, **BY** SC NM **IF** NP2 # P2

☐ Verify Next Grid Code – **BY** SC NM **IF** NGC # GC

☐ Verify Next Track (**STU.NTR**) field. - LIST STU SN LN FN ID GR NG SC NS TR NTR BY NG NTR IF TG = " " OR TG = "*"

You can use the following copy of the New Year Rollover Form from Aeries Web to record your selections Year to Year.

New Year Rollover Settings - District Wide

Clear existing District Asset Assignments (DRA)   ☐

Increment credit requirements in Graduation Requirements (REQ)   ☐

Copy next year's schools to current year in Streets (STR)   ☐

Only copy the latest set of Gradebook Backups (GBB)   ☐

Only copy the most recent Student Photo (PIC)   ☐

Bypass Teacher Briefcase Files (TFL)   ☐

Bypass Student Backpack Files (SFL)   ☐

Bypass Medical Log (MED)   ☐

Bypass Attendance Notes (ATN)   ☐

Bypass Free and Reduced Meals (FRE)   ☐

Copy only outstanding Fees (FEE)
Leave unchecked to copy ALL Fees   ☐

Increment Staff Years in Service (STF)
Uses the same logic as the Staff page "Update Totals" button   ☐

Update Student Group Staff/Students
Remove inactive staff and inactive/matriculating students from their groups   ☐

Enable SQL Query Store
Option requires SQL Server 2016 or newer   ☐

Enable Compression to Improve IO Performance
Option requires SQL Server 2016 or newer, but is also available for SQL Server 2008-2014
Enterprise or Developer Editions   ☐
Note: Compression causes a small increase in CPU usage on your SQL Server

Copy custom SQL modules
custom functions, stored procedures, etc.   ☐

Also ensure all of your custom tables are defined in Define Custom Tables
(even those that are unavailable in Aeries). Tables defined here without a Navigation Location will be copied in the Rollover but not visible in Aeries.

Close out open Authorizations (AUT)   ☐

New Year Rollover Settings - Inactive School

Students who are not rolled forward into a
valid school will be added to the Inactive School
based on the values defined below

Bypass the Copy to Inactive School Process
No students will be copied to the Inactive School,
resulting in a much higher "Missing Students" count

Inactive School Code _____

Status Tag _____
Active students not copied elsewhere will receive this Status Tag

Copy Graduates into the Inactive School
Copy graduating students with next grade 13 into the
Inactive School instead of being left in the prior year
Please note this is not a recommended option

New Year Rollover Settings - School Based

Do NOT Copy Student Records from This School
Students at this school not copied elsewhere ☐
may be copied to the Inactive School

Bypass Master Schedule (MST) ☐

Clear existing Textbook Assignments ☐

Change New Students Enter Date
Leave blank to not change

Use Schools Next Year Start Date when populated ☐

Copy Next Grade to Grade, add 1 to Next Grade ☐

Do NOT Bump Grades   14 ☐   15 ☐   16 ☐   17 ☐

Only copy Student (STU) records under <u>25</u> years of age ☐

Keep the same Locker assignments ☐

Keep Secondary Counselors ☐

Copy Next Teacher to Teacher (elementary only) ☐

Copy Next School of Residence to School of Residence ☐

Copy Next Inter/Intra District to Inter/Intra District ☐

Copy Next Track to Track ☐

Copy Next Program(s) to Program(s) ☐

Copy Next Grid Code to Grid Code ☐

Copy Pre-Enrolled Students from This School to their Next School
Pre-Enrolled students at this school whose Next School is valid for their Next Grade ☐
will be copied to their Next School as Active instead of remaining in this school
Please note this is not the recommended process for pre-enrolling students